TABLE OF CONTENTS

SYSTEM REQUIREMENTS	1
INSTALLATION	1
INSTALLING TAPIT IMPORT	1
CIENT IMPORT	4
GLOSSARY OF TERMS Before Importing Data Using Import Wizard	
USER IMPORT	
GLOSSARY OF TERMS BEFORE IMPORTING DATA IMPORTING USERS WITHOUT DEPARTMENTS IMPORTING USERS WITH DEPARTMENTS USING THE SAME CSV FILE TO IMPORT USERS AND DEPARTMENTS USING DIFFERENT CSV FILES TO IMPORT USERS AND DEPARTMENTS	22 22 24 34 34 58

TAPIT Import

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For newest information and updates go to http://www.trisys.com

SYSTEM REQUIREMENTS

- PentiumTM II Based PC
- 128 MB RAM
- MicrosoftTM Windows 98/NT/2000/XP Professional
- 250 MB free disk space
- Read/Write access to the TAPIT database
- Read/Write access to the to-be-imported CSV file.

INSTALLATION

Installing TAPIT Import

- 1. To start TAPIT Import installation program, double click on Setup.EXE.
- 2. TAPIT Import Setup screen appears

1	Tapit Import Setup	<u>×</u>
	Welcome to the Tapit Import installation program.	
	Setup cannot install system files or update shared files if they are in use. Before proceeding, we recommend that you close any applications you may be running.	
-	OK E <u>x</u> it Setup	

3. Click on **OK**.

Click on the installation Icon/Button to install TAPIT Import. 4.

🛃 Tapit Import Set	up		×		
Begin the installation by clicking the button below.					
	Click this button to install Tapit Import softwar directory.	e to the specified destination			
Directory:					
C:\Program Files\Tapit Import\ Change Directory					
	E <u>x</u> it Setup		_		

- 5.
- The **Choose Program Group** screen is displayed. Click on **Continue** to accept default option. TAPIT Import will install in TAPIT program group.

📮 Tapit Import - Choose Program Group	×
Setup will add items to the group shown in the Program Group box. You can enter a new group name or select one from the Existing Groups list.	
Program Group: Tapit Existing Groups:	
Accessories ASP to ASP.NET Migration Assistant Dell Accessories EARN HTML Help Workshop Lavasoft Ad-aware 6 Microsoft Web Publishing Power Scan Startup Tapit	
ContinueCancel	-

6. Wait until Setup program is done with file installation.

🛃 Tapit Import Setup	×
Destination File:	
C:\WINDOWS\SYSTEM32\msflxgrd.ocx	
45%	
Cancel	

7. Click on **OK** to the confirmation message.

Tapit Import Se	etup	x
Tapit Import Se	etup was comple	eted successfully.
		(
	ОК	

You can start using TAPIT Import.

CIENT IMPORT

Glossary of Terms

TEXT field – the field in CSV file that needs to be imported to TAPIT.

TAPIT field – the field in TAPIT Database. TEXT field is imported to TAPIT filed.

TEXT record – a record (a line) in CSV file. This record is imported to TAPIT Database to either Client or User table.

TAPIT record – a record in TAPIT Database. A record from CSV file (TEXT record) is imported to either Client or User table in TAPIT Database. Once in TAPIT Database, it becomes TAPIT record.

Before Importing Data

- TAPIT Import Wizard accepts files in a CSV (comma delimited) format. Use export facilities provided by the application you are importing from to create a CSV file.
- Before export, validate your data using guidelines below.

Validating Data

TAPIT Import matches TEXT records with TAPIT records – one to one

One TEXT record (one line in the CSV file) corresponds to one TAPIT record. Each Client/User has only one record in the CSV file. That record may contain, in Client case, **multiple phone numbers.**

Sample Client record from CSV file:

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

Each comma-delimited value is a **TEXT field** i.e. Hanover Florist is one of the TEXT fields. You would match the above fields to be imported the following way:

TEXT field	TAPIT field
Hanover Florist	Client Company Name
215 Ridgedale Ave	Client Business Address 1
Florham Park	Client City
NJ	Client State
(973) 360-2300	Client Phone Number
973-360-2222	Client Phone Number
99355	Client Account Code

TAPIT Client fields available for Import:

TAPIT Client Id field is not available for import from the CSV file. Instead TAPIT assigns a new Client Id to each imported record. Each Client TAPIT field can be associated with only one TEXT field except Client Phone Number. Client records can have more than one phone numbers, thus Client Phone Number can be matched with multiple TEXT fields, provided the phone numbers are within Client TEXT records (are listed on the same line in CSV text file).

Client First Name

Client Last Name and Client Company Name

If you import Last Name and Company Name:

Last Name will be combined with First Name and put into Client First Name in TAPIT.

Company Name will be put into **Last Name/Company** in TAPIT. **Company Name** cannot be empty in CSV file or the TEXT record is rejected (not imported to TAPIT). Company Name has to contain the name to represent Clients on the TAPIT reports.

If you import only Last Name (no Company Name):

Last Name will be put into Last Name/Company in TAPIT. Last Name cannot be empty in CSV file or the TEXT record will be rejected (not imported to TAPIT). Last Name has to contain the name to represent Clients on the TAPIT reports.

If you import only Company Name (no Last Name):

Company Name will be put into **Last Name/Company** in TAPIT. **Company Name** cannot be empty in CSV file or the TEXT record will be rejected (not imported to TAPIT). **Company Name** has to contain the name to represent Clients on the TAPIT reports.

Client Business Address 1

Client Business Address 2

Client City

Client State

Client Zip Code

Client Phone Number

Client can have multiple phone numbers – multiple TEXT fields can be associated with the TAPIT Client Phone Number filed. All phone numbers have to be listed within the same TEXT record as shown below.

For Example:

Sample Client record from CSV file

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

Each comma-delimited value is a TEXT field. You would match the above fields for Import the following way:

TEXT field	TAPIT field
Hanover Florist	Client Company Name
215 Ridgedale Ave	Client Business Address 1
Florham Park	Client City
NJ	Client State
(973) 360-2300	Client Phone Number
973-360-2222	Client Phone Number
99358	Client Account Code

Phone Number can contain digits, parenthesis (), dashes – and spaces. No other characters are accepted. If other characters are found the entire Client record associated with this Phone Number is rejected. 973-360-2300 – valid format.

(973) 360-2300 - valid format.

973.360.2300 - invalid format.

1-800-Pick UPS - invalid format.

973.360.2300 ext 103 - invalid format.

Phone Number cannot be less than 10 digits and more than 24 digits.

Phone Number cannot be duplicated in the TAPIT Database. If Phone Number already exists in the TAPIT Database, the entire Client record associated with this Phone Number is rejected.

For example:

There is a client in TAPIT with the Phone Number "(973) 360-2300". The attempt to import record:

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

is unsuccessful because it would duplicate the phone number - "(973) 360-2300".

If a Phone Number is duplicated within CSV file the record with the first instance of this Phone Number is saved in TAPIT Database. All subsequent records containing the same Phone Number are rejected.

For example:

First record:

"Hanover Florist", "440 Ridgedale Ave", "Florham Park", "NJ", "(**973**) **360-2300**", "973-360-2133", "02358" – this record is saved

Second record:

"Trisys, Inc.","215 Ridgedale Ave", "Florham Park","NJ","(**973**) **360-2300**","973-360-2222","99358" this record is rejected because it would duplicate the phone number – "(973) 360-2300".

Client Account Code

Client can have only one Account Code.

Account Code field accepts digits and letters. No other characters are accepted. If characters, other than digits and letters, are found the entire Client record associated with this Account Code is rejected.

99358- valid format.

UPSCOM - valid format.

99**#8 - invalid format.

Account Code cannot be more than 16 digits/letters.

Account Code cannot be duplicated in TAPIT. If an Account Code exists in TAPIT Database already the entire record associated with this Account Code is rejected.

For example:

There is a client in TAPIT with the Account Code "99358".

In this case the attempt to import record: "Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358" will be unsuccessful because it would duplicate the Account Code –" 99358".

If an Account Code is duplicated within the CSV file the first record read is saved in TAPIT Database. All subsequent records, containing the same Account Code, are rejected.

For example:

Two records have the same Account Code – 99358.

The record for Hanover Florist is read first.

"Hanover Florist","440 Ridgedale Ave","Florham Park","NJ","(973) 360-2111","973-360-2133"," 99358"

The Hanover Florist record is saved.

The record for Trisys, Inc. is read second.

"Trisys, Inc.","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

At this time TAPIT Database already contains Account Code 99358 associated with the Hanover Florist Client. Thus, Trisys, Inc. record is rejected because it would duplicate the Account Code – "99358".

Examples of Client CSV file (displayed in Excel) How to import Client Last Name and Client Company Name properly

TAPIT field **Client Last Name/Company** holds a name identifying Client on the TAPIT reports. Either **Client Last Name** or **Client Company Name** is stored in this field. The following scenarios explain how the CSV file format impacts import to the **Client Last Name/Company** field.

CASE 1

The Client CSV file contains Last Name but NO Company Name.

Client Last Name identifies Clients on the TAPIT reports.

	Microsoft Ex	cel - Client.CSV								
	Bile Edit View Insert Format Tools Data Window Help									
] [) 🖻 🖬 🔒) 🖨 🖪 🖤	Ba 🛍	🗠 + 🚷	Σ <i>f</i> ≈ <mark>2</mark> ↓	1	🤉 🙄 A	rial	• 10 •	B
	L27	▼ =								
	A	В	D	E	F	G	Н		J	k
1	First Name	Last Name	Account C	Street	City	State	Zip	Phone 1	Phone 2	
2	Samuel	Jones	13456	1386 Syca	Marion	OH	43567	419 825 3257		
3	Simon	Gabriel	12345	235 Hellna	Bayonne	NJ	7925	201 898 1386		
4	Kathy	Clark	58925			NJ	79815	908 835 5687	908 25155	48
5	Henry	Goldstain	89651	1464 Hamj	Jersey City	NJ	71978	(973) 458-7245	1(973) 565	-4565
6	Nancy	Davey	50983	235 Shelto	Thornton	CO		(303) 429-5812	1(303) 480	-5499
7	Teresa	Litak		135 Sill Dr	Hally	MD	97235	(548) 448-5489	1(484) 548	-4564
8	Anna	Chua		1464 Hamj	Jersey City	NJ	7978	(201) 458-7245	(973) 565-4	1565
9	Agnes	Litak		215 Ridged	Florham P	NJ	7932	(973) 360-2222	(973) 360-2	2300
10)									

The **Last Name** column holds only Client last names. The **Company** column does not exist. In this scenario **Last Name** column must have an entry for each Client. If the **Last Name** text filed is empty the Client TEXT record is not going to be imported to TAPIT.

When imported to TAPIT, contents of the **First Name** TEXT field are saved in the **Client First Name** TAPIT field. **Last Name** goes into the **Client Last Name/Company** field.

The following screen shows how **First Name** and **Last Name** TEXT fields (line 3 the CSV file above) are saved in TAPIT.

Client
Client Last Name / Company
Gabriel
Client First Name
Simon

CASE 2

The Client CSV file contains Client Last Name and Client Company Name for each Client. Client Company Name identifies Clients on the TAPIT reports.

	Microsoft Exe	cel - Client.CS¥							
] <u>F</u> ile <u>E</u> dit <u>V</u> i	iew <u>I</u> nsert F <u>o</u> r	mat <u>T</u> ools <u>D</u> ata <u>W</u> ind	ow <u>H</u> elp					
] [) 🖻 🖬 🔒) 🖨 🖪 💖	🖹 🛍 🗠 🔹 🍓	$\Sigma f_{s} \frac{1}{2}$	l 🛍 🔇			•	10 -]
	E11	▼ =							
	A	В	С	D	E	F	G	Н	
1	First Name	Last Name	Company	Account C	Street	City	State	Zip	Phone 1
2	Samuel	Jones	Plastic & Wood, Inc	13456	1386 Syca	Marion	OH	43567	419 825 3
3	Simon	Gabriel	General Telecom, In	12345	235 Hellna	Bayonne	NJ	7925	201 898 1
- 4	Kathy	Clark	Comaid	58925			NJ	79815	908 835 {
5	Henry	Goldstain	Tristate Co.	89651	1464 Hamj	Jersey City	NJ	71978	(973) 458
6	Nancy	Davey	1 Nation Technology	50983	235 Shelto	Thornton	CO		(303) 429
- 7	Teresa	Litak	Trisys Telecom, Inc		135 Sill Dr	Hally	MD	97235	(548) 448
8	Anna	Chua	Tristate Co.		1464 Hamj	Jersey City	NJ	7978	(201) 458
9	Agnes	Litak	Trisys Telecom		215 Ridged	Florham P	NJ	7932	(973) 360
10	1								

The Last Name column holds only Client last names. The Company column holds only Client company names. In this scenario Company column must have an entry for each Client. If the Company TEXT filed is empty the TEXT record is not going to be imported to TAPIT.

When imported to TAPIT, **First Name** TEXT field is combined with **Last Name** TEXT field and is saved into the **Client First Name** TAPIT field. **Company Name** goes into the **Client Last Name/Company** field.

The following screen shows how **First Name**, **Last Name** and **Company** TEXT fields (line 3 the CSV file above) are saved in TAPIT.

Client	
Client Last Name / Company	
General Telecom, Inc	
Client First Name	
Simon Gabriel	

CASE 3

The Client CSV file contains Client Last Name for some Clients and Client Company Name for others. Clients are represented on the TAPIT reports by Company Name in some cases and by Last Name in other.

M	Microsoft Excel - ClientLastComp.CSV								
	🕮 File Edit View Insert Format Tools Data Window Help								
D	🖻 🖬 🔒) 🖨 🖪 💞	🖹 🖻 🗠 🖌 🍓	$\Sigma f_{\mathbf{x}} \stackrel{A}{\geq}$	l 🛍 😰	💝 🛛 Arial		•	10 - B
	J26	▼ =							
	A	В	С	D	E	F	G	Н	
1	First Name	Last Name	Company	Account C	Street	City	State	Zip	Phone 1
2	Samuel	Jones	Jones	13456	1386 Syca	Marion	OH	43567	419 825 3
3	Simon		Gabriel	12345	235 Hellna	Bayonne	NJ	7925	201 898 1
4	Kathy	Clark	Comaid	58925			NJ	79815	908 835 5
5	Henry	Goldstain	Tristate Co.	89651	1464 Hamj	Jersey City	NJ	71978	(973) 458-
6	Nancy	Davey	1 Nation Technology	50983	235 Shelto	Thornton	CO		(303) 429-
7	Teresa	Litak	Trisys Telecom, Inc		135 Sill Dr	Hally	MD	97235	(548) 448-
8	Anna	Chua	Tristate Co.		1464 Hamj	Jersey City	NJ	7978	(201) 458-
9	Agnes		Litak		215 Ridged	Florham P	NJ	7932	(973) 360-

The **Last Name** column holds only Client last names. The **Company** column holds both Client company names and last names (in case Client does not have a company name). This column has to hold the client identifier – the name you want to use to represent Client on the TAPIT reports.

In this scenario **Company** column must have an entry for each Client. If the **Company** TEXT filed is empty the TEXT record is not going to be imported to TAPIT.

When imported to TAPIT, the **First Name** TEXT filed is combined with the **Last Name** TEXT field and goes into the **Client First Name** TAPIT field. **Company** column goes into **TAPIT Client Last Name/Company**.

The following screens show how **First Name**, **Last Name** and **Company** text fields are saved in TAPIT. (line 3 of the CSV file above)

Client						
Client Last Name / Company						
Gabriel						
Client First Name						
Simon						

(line 6 of the CSV file above)

Client						
Client Last Name / Company						
1 Nation Technology						
Client First Name						
Nancy Davey						

Using Import Wizard

1. Start Import Wizard by clicking on **START/TAPIT/TAPIT Import**.

THIT User/ cheminport s	ereen appears.	
TAPIT Import Wizard 1.1.0		_ 🗆 ×
TAPIT User/Client	Import Welcome to the TAPIT User/Client Import Wizerd This utility program guides you through client/user data import. Data can be imported from a comma delimited (CSV) file. TAPIT Client/User Id fields are not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record. User Instructions Examples of CSV Files Click on Next >>' to Continue.	
Cancel	<< Back Next >> Finish	

2. Click on Next.

Select **Destination Table** screen displays.

Select IMPORT destination TAPIT table:						
•	CLIENTS					
0	USERS					
C	USERS					

Click on **Clients** option to check it.

3. Click on Next.

Locate Files screen opens.

Enter the Path to the CSV file, or click on the **Browse** button to find it.

Import CLIENTS from CSV File:				
Enter the path to the csv file or click on 'Browse' to find it.				
C:\CVSfiles\Client.CSV Browse				

Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

Import TO TAPIT Database (tapitdb.mdb) File:					
Enter the path to the TAPIT database (tapitdb.mdb) file or click on 'Browse' to	o find it.				
C:\TapitW32\Tapitdb.mdb	Browse				
·					

4. Click on Next

Column Headers screen comes up.

APIT Import Wize	ard 1.1.0				_			
Column	Headers							
CLIENTS IMPORT								
Examples of CSV files								
Views	View cample CEV file for Client impart							
tiew sample cat the for chenc imporc								
Does the first	t row contain header?							
	Sampl	e Text File Data (max 100) records shown)					
First Name	Last Name	Company	Account Code	Street	City			
amuel	Jones	Plastic & Wood, Inc.	13456	1386 Sycamore Lane	Mario			
Simon	Gabriel	General Telecom, Inc.	12345	235 Helina Rd	Bayo			
Cathy	Clark.	Comaid	58925					
leny	Goldstain	Tristate Co.	89651	1464 Hampton Dr.	Jerse			
lancy	Davey	1 Nation Technology	50983	235 Shelton Str	Thorr			
eresa	Litak	Trisys Telecom, Inc.		135 Sill Drive	Hally			
inna	Chua	Tristate Co.		1464 Hampton Dr.	Jerse			
Agnes	Litak	Trisys Telecom		215 Ridgedale Ave	Florha			
4					,			
					-			
Ca	incel	<< Back	Next >>	Finish				

Does the first row contain headers?

Check this option if the first line of your CSV file contains TEXT field names.

Does the first row contain header?

5. The **Sample Text File Date** is displayed on your screen. Only the first 100 lines of your CSV file are displayed. Please check if the CSV data is separated into columns properly.

First Name	Last Name	Company	Account Code	Street	City
Samuel	Jones	Plastic & Wood, Inc.	13456	1386 Sycamore Lane	Mario
Simon	Gabriel	General Telecom, Inc	12345	235 Hellna Rd	Bayo
Kathy	Clark	Comaid	58925		
Henry	Goldstain	Tristate Co.	89651	1464 Hampton Dr.	Jerse
Nancy	Davey	1 Nation Technology	50983	235 Shelton Str	Thor
Teresa	Litak	Trisys Telecom, Inc		135 Sill Drive	Hally
Anna	Chua	Tristate Co.		1464 Hampton Dr.	Jerse
Agnes	Litak	Trisys Telecom		215 Ridgedale Ave	Florh

Sample Text File Data (max 100 records shown)

6. Click on **Next**.

The **Match Fields** screen appears. This screen lets you match TAPIT fields with the corresponding TEXT fields.

APIT Import Wizard 1	.1.0				
Match Fi	elds]				
			CLIENTS IMPORT		
Records to IMPORT:	1	Sample Text	File Data (max 100 rec	ords shown)	_
9	Field 0	Field 1	Field 2	Field 3	Field +
	First Name	Last Name	Company	Account Code	Stree
	Samuel	Jones	Plastic & Wood, Inc.	1345	3
EP 1	Simon	Gabriel	General Telecom, Inc.	1234	5
ect an item from	Kathu.	Clark	Comaid	5892	
st File Columns'	•				•
and a					_
responding field					
ne from 'Tapit	Tapi	t Database Fields	Match Fields	Text File Columns	
tabase Fields' list.					
CD 2			<u> </u>		
		Add matched	fields to the Two	ant lint	
ck on the 'Add		Add matched	fields to the Imp	ort list	
itched" button					
save this					
dection for Import.					
meat stens 1 2					
appear steps 1, 2					
til all heids are					
tched.					
ch Tapit Field,					
cent Phone					
cept r none					
inder can be					
tched with ONLY					
e Text File					
lumo					
one Number Field					
one Number Field					
n be matched with					
dtiple Text File					
					-
dumns.					<u> </u>
lumns.		Remove	item from the Imp	ort list	-
lumns.		Remove	item from the Imp	ort list	_
lumns.		Remove	item from the Imp	ort list	_
lumns. Cance		Remove	item from the Imp	Finish	

- 7. **Sample Text File Data** on the top of the screen, displays up to 100 records of the CSV TEXT file data. The top row consists of the names of the TEXT file columns. These names are listed in the **Text File Columns** list box. Sample Data is provided as a reference in field matching. You can check what data each column contains.
- 8. Select a TAPIT field from **TAPIT Database Fields** list box and then a corresponding item from **Text File Columns**.

Tapit Database Fields	Match Fields	Text File Columns	
Client Account Code	💌 💳 🗛 Account Code		•

 Click on Add matched fields to the Import List. The matched fields appear on the Import List. Repeat steps 9 and 10 until you're done with matching fields.

Client First Name	=	First Name
Client Last Name	=	Last Name
Client Company Name	=	Company
Client Business Address 1	=	Street
Client City	=	City
Client State	=	State
Client Zip Code	=	Zip
Client Phone Number	=	Phone 1
Client Phone Number	=	Phone 2
Client Account Code	=	Account Code
	Client First Name Client Last Name Client Company Name Client Business Address 1 Client City Client State Client State Client Zip Code Client Phone Number Client Phone Number Client Account Code	Client First Name=Client Last Name=Client Company Name=Client Business Address 1=Client City=Client City=Client State=Client Zip Code=Client Phone Number=Client Account Code=

WHEN MATCHING CLIENT FIELDS

Either Client Last Name or Client Company Name has to be imported.

If Client Company Name is included in import - this field cannot be empty.

If Client Company Name is not included, then Client Last Name has to be included and it cannot be empty.

TAPIT **Client Phone Number** is the only field that can be matched with multiple TEXT fields (columns). Client can have multiple phone numbers.

All other TAPIT fields can be matched each with only one TEXT field (column).

10. When all fields are matched, click on **Next**. The **Import Screen** appears.

This screen displays the final field selection for import.

Import				
	CLIENTS IMP	ORT		
IMPORT	Tapit Database Fields	IMPORT	LIST Text File Columns	
Import Wizard imports	Client Name		First Name AND Last Name	
matched in the Import	Client Company Name		Company	
List.	Client Business Address 1	-	Street	
Data from the Tout	Client City	-	City	
File Columns is	Client State	-	State	
imported to the	Client Zip Code	-	Zip	
corresponding Tapit	Client Phone Number	-	Phone 1	
Fields.	Client Phone Number	-	Phone 2	
	Client Account Code	-	Account Code	
the 'Match Fields' screen. Add/remove the Import List items. TO IMPORT NOW click on the 'Finish' button.				
	1			

11. Import Wizard imports data the way it is matched in the Import List.

Tapit Database Fields	PORT	LIST Text File Columns
Client Name	=	First Name AND Last Name
Client Company Name	=	Company
Client Business Address 1	=	Street
Client City	=	City
Client State	=	State
Client Zip Code	=	Zip
Client Phone Number	=	Phone 1
Client Phone Number	=	Phone 2
Client Account Code	=	Account Code

If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. Add or **Remove** rows from the **Import List**.

Otherwise, click on Finish to import.

12. When import is completed, a confirmation message appears.



Click on **OK**.

13. The Import screen changes.

TAPIT Import Wizard 1.1.0		_D×
Import		
	CLIENTS IMPORT	
Total text (csv) records: 8	Total records imported to 'Client' table: 7 Total records rejected: 1	
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 030205200609_Log.log View Import LOG File 030205200609_Log.log file is located in: C:\Ptogram Files\Tapit Import\LogFiles\ folder. View Rejected Records - File: 030205200609_Rejected.csv	
Rejected Records File Click on the View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records CSV File 030205200809_Rejected.csv file is located in: C:VPtogram Files\Tapit Import\LogFiles\ folder. How to REVISE Rejected Records CSV file Import REVISED Rejected Records CSV file Import REVISED Rejected Records CSV file Import REVISED Rejected Records File: 030205200609_Log.csv Import REVISED Rejected Records CSV File	
Cancel	<< Back Next >> Finish	

Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 8 total TEXT records, 7 TEXT records were successfully saved (imported) into the TAPIT Database. 1 TEXT record was rejected (was not imported).

	Total text (csv) records: 8	Total records imported to 'Client' table: 7	Total records rejected: 1
_			

14. To find out more about rejected records click on the View Import Log File button.

View Log Information - File: 030205200609_Log.log	
View Import LOG File	
030205200609_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.	

The log file contains information about import.

Import FROM CSV file C:\CVSfiles\Client.CSV Import TO the C:\TAPITW32\TAPITdb.mdb database, Client table ****** FIELDS ARE MATCHED THE FOLLOWING WAY: Client Name = First Name AND Last Name (Field0 & ' ' & Field1 ClientFirstName) Client Company Name = Company (Field2 ClientLastName) Client Business Address 1 = Street (Field4 ClientBAddress1) Client City = City (Field5 ClientBCity) Client State = State (Field6 ClientBState) Client Zip Code = Zip(Field7 ClientBZip) Client Phone Number = Phone 1 (Field8 CPNPhoneNumber) Client Phone Number = Phone 2 (Field9 CPNPhoneNumber) Client Account Code = Account Code (Field3 ClientAccountCode)

(why records were rejected

rec # matches the record number in a rejected file csv)

Rejected rec # 1Phone Number: "9735654565" already exists in a database and has not been saved in TAPIT

(Import statistics)

15. To view rejected records click on the View Rejected Records CSV File button



16. The following screen opens up. Click on View File



The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).

The entries marked bold in this manual are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.

The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file. The headers must be left unchanged.

"Rec Number", "Company", "First Name AND Last Name", "Street", "City", "State", "Zip", "Account Code", "Phone 1", "Phone 2" (*end of headers*)

"1", "Tristate Co.", "Anna Chua", "1464 Hampton Dr.", "Jersey City", "NJ", "7978", "", "(201) 458-7245", **''(973) 565-4565''** (end of line 1)

The same Rejected Records file after corrections:

"Rec Number", "Company", "First Name AND Last Name", "Street", "City", "State", "Zip", "Account Code", "Phone 1", "Phone 2" (*end of headers – did not change anything here*)

"1", "Tristate Co.", "Anna Chua", "1464 Hampton Dr.", "Jersey City", "NJ", "7978", "", "(201) 458-7245", **''(973) 230-**4489'' (end of line 1 - revised)

The Rejected Records file needs to be saved in Notepad under the same name.

17. Now you can import rejected records again by clicking on Import Revised Rejected Records CSV File.

Import REVISED Rejected Records CSV File

18. If you have corrected the Rejected Records file and saved it under the same name (overwritten) then click on **OK** to continue.

Tapit Import	×
This action will IMPORT C:\Program Files\Tapit Import\LogFiles\030205200609_Rejected.csv fil If you have revised 030205200609_Rejected file and saved changes under the same name ar Import\LogFiles\030205200609_Rejected.csv) then click on OK. Otherwise click on CANCEL and open the file for correction using the 'Wew Rejected CSV File' b	e to TAPIT. Id path (C:\Program Files\Tapit Ittop
(OK Cancel	

19. TAPIT Import Wizard will import records from the Rejected Records file. When import is finished it will display the following message:

	-	2	U	U
Tapit Import				×
Import Completed. Please se	ee Impor	t.Log	for more inform	ation.
	ОК			

Click on OK.

20. The Import screen changes to reflect the new import results (import from Rejected Records csv file). In our example:

"Total text (csv) records: 1" - total number of text records in the Rejected Records csv file.

"Total records imported to 'Client' table:1" – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.

TAPIT Import Wizard 1.1.0		
Import		
	CLIENTS IMPORT	
Total text (csv) records: 1	Total records imported to 'Client' table: 1	Total records rejected: 0
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 030205200609_Lo View Import LOG 030205200609_Log log file is located in: C:\Phogram Files\Tapit Import\LogFiles\ folder.	g.log File
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV formal. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records	CSV File
Cancel	<< Back Next >>	Finish

Client import is completed.

21. You can go to TAPIT and view Clients screen.

Image: New
Clients Client Sort By: Client Client Acc. Code Phone 1 Nation Technology Nancy Daw 50983 3034805499 1 Nation Technology Nancy Daw 50983 3034295812 Comaid Kathy Clark 58925 9082515548 Comaid Kathy Clark 58925 908355687 General Telecom, Inc Simon Gal 12345 2018981386 Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Tristate Co. Anna Chua 9732304489 Totate Co. Anna Chua 9732304489
Sort By: Client Acc. Code Phone Client Last Name / Company 1 Nation Technology Nancy Daw 50983 3034805499 Instance Co Instance Co 1 Nation Technology Nancy Daw 50983 3034295812 Instance Co Instance Co Comaid Kathy Clark 58925 908355687 Client First Name Account Code Comaid Kathy Clark 58925 908355687 Account Code Instance Co Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Address 1 Address 1 Tristate Co. Anna Chua 9732304489 1464 Hampton Dr.
Client Acc. Code Phone Client Last Name / Company 1 Nation Technology Nancy Daw 50983 3034805499 Initiate Co. 1 Nation Technology Nancy Daw 50983 3034295812 Initiate Co. 1 Nation Technology Nancy Daw 50983 3034295812 Client First Name Cornaid Kathy Clark 58925 908355687 Anna Chua Cornaid Kathy Clark 58925 908355687 Account Code General Telecom, Inc Simon Gal 12345 2018981386 Initiate Co. Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Address 1 Tristate Co. Anna Chua 9732304489 Initiate State Co.
1 Nation Technology Nancy Daw 50983 3034805499 1 Nation Technology Nancy Daw 50983 3034295812 Comaid Kathy Clark 58925 9082515548 Comaid Kathy Clark 58925 908355687 General Telecom, Inc Simon Gal 12345 2018981386 Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Tristate Co. Anna Chua 9732304489 Address 1 105446 Co. Anna Chua 5014597255
1 Nation Technology Nancy Daw 50983 3034295812 Client First Name Comaid Kathy Clark 58925 9082515648 Anna Chua Comaid Kathy Clark 58925 9088355687 Account Code General Telecom, Inc Simon Gal 12345 2018981386 Account Code Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Address 1 Tristate Co. Anna Chua 9732304489 1464 Hampton Dr.
Comaid Kathy Clark 58925 9082515548 Anna Chua Comaid Kathy Clark 58925 908355687 Account Code General Telecom, Inc Simon Gal 12345 2018981386 Account Code Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Address 1 Tristate Co. Anna Chua 9732304489 Address 1 Tostete Co. Anna Chua 914434485 1464 Hampton Dr.
Comaid Kathy Clark 58925 9088355687 Account Code General Telecom, Inc Simon Gal 12345 2018981386 Image: Control of Contr
General Telecom, Inc Simon Gal 12345 2018981386 Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Tristate Co. Anna Chua 9732304489 Instate Co. Anna Chua 9732304489
Plastic & Wood, Inc. Samuel Joi 13456 4198253257 Tristate Co. Anna Chua 9732304489 Address 1 Tristate Co. Anna Chua 2014497244 1464 Hampton Dr.
Tristate Co. Anna Chua 9/32304489 1464 Hampton Dr.
Instate Co. Anna Chua 201490/249 11454 Hampton Ur.
Trickie Co. Name Coldstein D2551 072555 1555
Tristate Co. Henry Goldstain 09601 97/30004000 Address 2
Trisve Telecom Agnes Litek 9733502300
Trisve Talacom Agnes Litak 9733602300 City State ZIP code
Trisys Telecom Inc Teresa Litak 4845484564 Jersey City NI 7978
Trisys Telecom, Inc Teresa Litak 5484485489
Phone Numbers(s)
Add >> 2014587245
9732304489
Remove <<

USER IMPORT

Glossary of Terms

TEXT field – the field in CSV file that needs to be imported to TAPIT.

TAPIT field – the field in TAPIT Database. TEXT field is imported to TAPIT filed.

TEXT record – a record in CSV file. This record is imported to TAPIT Database to either Client or User table.

TAPIT record – a record in TAPIT Database. A record from CSV file (TEXT record) is imported to either Client or User table in TAPIT Database. Once in TAPIT Database, it becomes TAPIT record.

Before Importing Data

- TAPIT Import Wizard accepts files in a CSV (comma delimited) format. Use export facilities provided by the application you are importing from to create a CSV file.
- Before export, validate your data using guidelines below.

TAPIT User fields available for Import:

TAPIT User Id field is not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record.

TAPIT Import does not import any information concerning Departments. Departments have to be manually created and assigned to Users via TAPIT application, when import is completed.

Each User TAPIT field can be associated with only one TEXT field except User Extension. User records can have more than one extensions, thus User Extension can be matched with multiple TEXT fields.

User First Name

User Last Name

User Last Name is a required filed in TAPIT. If it is empty the entire User TEXT record is not saved into the TAPIT Database

User Authorization Code

There can be only one Authorization Code per User

TAPIT Authorization Code field accepts digits and letters. If characters, other then digits and letters, are found the entire User record associated with this Authorization Code is rejected.

99358- valid format.

UPSCOM – valid format.

99**#8 – invalid format.

Authorization Code cannot be more than 16 digits/letters.

Authorization Code cannot be duplicated in TAPIT Database. If an Authorization Code already exists in TAPIT Database the entire record associated with this Authorization Code is rejected. **For example:**

There is a USER in TAPIT with the Authorization Code "8858". In this case the attempt to import record:

"Mark","Brown","**8858**",".05",".10","","125","118"123" will be unsuccessful because it would duplicate the Account Code –" 8858".

If an Authorization Code is duplicated within the CSV file the record with the first instance of this Authorization Code is saved in TAPIT Database. All subsequent records, containing the same Authorization Code, are rejected.

For example:

"Mark","Brown","8858",".04",".05","","102","101"103" - this record is saved

"John","Smith","**8858**",".05",".10","","125","118"123" - this record is rejected because it would duplicate the Authorization Code "8858".

User Surcharge Per Minute

Surcharge Per Minute has to be a numeric value – the only other character allowed is \$ and a decimal point.

User Surcharge Per Call

Surcharge Per Call has to be a numeric value – the only other character allowed is \$ and a decimal point.

User Multiplier (percent)

Surcharge Per Call has to be a numeric value - the only other character allowed is % and a decimal point.

User Extension

User can have multiple extensions – multiple TEXT fields can be matched with the TAPIT Extension filed.

User Extension field allows ONLY for digits. No other characters are accepted. If other characters are found the entire User record associated with this Extension is rejected. 115–valid format.

ext. 115 - invalid format.

Extensions cannot have more than 9 digits

Extension cannot be duplicated in TAPIT. If an Extension already exists in TAPIT Database the entire record associated with this Extension is rejected.

For example:

There is a USER in TAPIT with the Extension "125". In this case the attempt to import record:

"Mark", "Brown", "8858", ".05", ".10", "", "125", "118"123" will be unsuccessful because it would duplicate the Extension – "125".

If an Extension is duplicated within the CSV file the record with the first instance of this Extension is saved in TAPIT Database. All subsequent records containing the same Extension are rejected.

For example:

"Mark","Brown","8858",".04",".05","","102","125"103" - this record is saved.

"John","Smith","4589",".05",".10","","125","118"123" - this record is rejected because it would duplicate the extension "125".

Importing Users without Departments

Example of User CSV file (displayed in MS Excel)

	licrosoft Exe	cel - User.cs	v			
8	<u>File E</u> dit	<u>V</u> iew <u>I</u> nse	ert F <u>o</u> rmat	<u>T</u> ools <u>D</u> a	ata <u>W</u> indow	
D	🖻 🔒 🔒) 🔁 🖾 🕯	à 🌮 🕺		ν 🍓 Σ 🕶 🛓	
č a	🔄 🌆 🚵 🖾 🗞 🖉 🧏 🔂 😥 🐄 Reply with Changes					
	J29	•	fx			
	A	В	С	D	E	
1	first	last	auth	ext1	ext2	
2	David	Brady		2830	2831	
3	Hellen	Smith		2829	2832	
4	Joe	McDonald		2828	2833	
5	Larry			2827	2834	
6	Dianne	Jones		2830	2835	
7	Daniel	Constant			2836	
8	Ashley	Dermack			2837	
9	Thomas	Timothy			2838	
10	Abigail	Pulkita			2868	
11	Erick	Evans			8774	
12	Tyler	Darling	401885		48013	
13	Connor	Dill	40*#89		48014	
14	Ben	Davis	404852		48015	
15	Daniel	Chuang	401268		48017	
16	Ann	Kroeger	401565		48018	
17	Matthew	Nolle	401587		48019	
18	Andrew	Sullivan	401586		48020	
19						

Line No.	Is it going to be imported to TAPIT?	Why is the User record rejected?
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.
Line 2 -4	YES	
Line 5	NO	The required USER filed Last Name is left blank.
Line 6	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.
Lines 7-12	YES	
Line 13	NO	The Authorization Code TAPIT field accepts only digits and letters. The 40*#89 is not a correct format because it contains other characters (*#).
Lines 14-19	YES	

Using Import Wizard

1. Start Import Wizard by clicking on START/TAPIT/TAPIT Import.

TAPIT User/Client Import screen appears.



2. Click on Next.

Select **Destination Table** screen displays.

Select IMPORT destination TAPIT table:
O CLIENTS
• USERS

Click on **Users** option to check it.

3. Click on Next.

Import Departments? screen appears. In this example the CSV file does not contain any Departments. Click on No to the **Do you want to import Departments?**



4. Click on Next.

Locate Files screen opens.

Enter the Path to the CSV file, or click on the Browse button to find it.

Enter the path to the csv file or click on 'Browse' to find it.	
C:\CVSfiles\User.csv	Browse

Enter the Path to the TAPIT Database, or click on the Browse button to find it.

Import TO TAPIT Database (tapitdb.mdb)) File:
Enter the path to the TAPIT database (tapitdb.mdb) file or clid	lick on 'Browse' to find it.
C:\TapitW32\Tapitdb.mdb	Browse

5. Click on Next

Column Headers screen comes up.

Goldm	Inteducio	USERS	IMPORT			_
Examples of View	CSV files sample CSV file for U	ser import				
Does the fir	st row contain header?					
	Sampl	e Text File Data (I	max 100 records s	hown)		
first	last	auth	ext1		ext2	
David	Brady			2830	2831	
Hellen	Smith			2829	2832	
Joe	McDonald			2828	2833	
Lany				2827	2834	
Dianne	Jones			2830	2835	
Daniel	Constant				2836	
Ashley	Demack.				2837	
Thomas	Timothy				2838	
Abigail	Pulkita				2868	
Erick.	Evans				8774	
Tyler	Darling		401885		48013	
Connor	Dill		40*#89		48014	
Ben	Davis		404852		48015	
Daniel	Chuang		401268		48017	
Ann	Kroeger		401565		48018	
Matthew	Nole		401587		48019	
Andrew	Sullivan		401586		48020	
•						Þ

Does the first row contain headers?

Check this option if the first line of your CSV file contains TEXT field names.

Does the first row contain header?

6. The **Sample Text File Date** is displayed on your screen. Only the first 100 lines of your CSV file are displayed. Please check if the CSV data is separated into columns properly.

	Sample Tex	t File Data (max 10)	J records shown)	
first	last	auth	ext1	ext2
David	Brady		2830	2831
Hellen	Smith		2829	2832
Joe	McDonald		2828	2833
Larry			2827	2834
Dianne	Jones		2830	2835
Daniel	Constant			2836
Ashley	Dermack			2837
Thomas	Timothy			2838
Abigail	Pulkita			2868
Erick	Evans			8774
Tyler	Darling	401885		48013
Connor	Dill	40*#89		48014

7. Click on Next.

The Match Fields screen appears.

This screen lets you match TEXT fields with the corresponding TAPIT fields.

S. TAPIT Import Wizard 1.1	1.0				_ D ×
Match Fie	elds				
			USERS IMPORT		
Records to IMPORT:		Sample Text	File Data (max 100 re	cords shown)	
17	first	last	auth	ext1	ext2 +
<u> </u>	David	Brady			2830
	Helen	Smith			2829
STEP 1	Joe	McDonald			2828
Select an item from	Lanu.				2907 -
'Text File Columns'	4				•
list and a					
corresponding field			Match Fields		
name from 'Tapit		Tapit Database Fields	Match Fields	Text File Columns	
Database Fields list.		-	• =		-
STEP 2					
Click on the 'Add		Add matched	fields to the Imp	port list	
matched ' button					
to save this					
selection for Import.					
until all fields are					
matched.					
Each Tapit Field,					
except Extension					
can be matched with					
ONLY one Text File					
Column.					
Extension Field					
can be matched with					
multiple Text File	•				<u> </u>
Columns,					
		Remove	item from the Im	port list	
	1	1	[1
Cancel		<< Back	Next >>	Finish	

- 8. **Sample Text File Data** on the top of the screen, displays up to 100 records of the CSV TEXT file data. The top row is the names of the TEXT file columns. These names are listed in the **Text File Columns** list box. Sample Data is provided as a reference in field matching, so you can check what data each column contains.
- Select a TAPIT field from TAPIT Database Fields list box and then a corresponding item from Text File Columns.

Tapit Database Fields	Match Fields	Text File Columns	
User Extension	💌 💳 ext2		•

10. Click on **Add matched fields to the Import List**. The matched fields appear on the **Import List**.

User First Name	=	first
User Last Name	=	last
User Authorization Code	=	auth
User Extension	=	ext1
User Extension	=	ext2

Repeat steps 9 and 10 until you're done with matching fields.

WHEN MATCHING USER FIELDS

User Last Name has to be included in the Import List. This TEXT flied (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

All other TAPIT fields can be matched with only one TEXT field (column).

11. When all fields are matched, click on **Next**. The **Import Screen** appears.

Tapit Database Fields	IMPORT	LIST	Text File Columns
User First Name	=	first	
User Last Name	=	last	
User Authorization Code	=	auth	
User Extension	=	ext1	
User Extension	=	ext2	

This screen displays the final field selection for import.

Import Wizard imports data the way it is matched in the Import List.

If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. Add or **Remove** rows from the **Import List**.

Otherwise, click on **Finish** to import.

12. When import is completed, a confirmation message appears.

ImportTapit	×
Import Completed. Please see Import.Log for more	e information.
[OK]	

Click on OK.

13. The Import screen changes.

TAPIT Import Wizard 1.1.0		_O×
Import		
	USERS IMPORT	
Total text (csv) records: 17	Total records imported to 'User' table: 14 Total records rejected: 3	
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 030205212456_Log.log View Import LOG File 030205212456_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder. View Bajected Records - File: 030205212456_Bajected cay	
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV Nie. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records CSV File 030205212456_Rejected.csv file is located in: C:\Program Files\T apit Import\LogFiles\ folder. How to REVISE Rejected Records CSV file Import REVISED Rejected Records CSV file Import REVISED Rejected Records CSV file Import REVISED Rejected Records CSV file	
Cancel	<< Back Next >> Finish	

Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 17 total TEXT records, 14 TEXT records were successfully saved (imported) into the TAPIT Database. 3 TEXT records were rejected (were not imported).

Total text (csv) records: 17	Total records imported to 'User' table: 14	Total records rejected: 3

14. To find out more about rejected records click on the View Import Log File button.



The Log file opens in Notepad..

```
======USERS IMPORT========
Import FROM CSV file C:\CVSfiles\User.csv
Import TO the C:\TAPITW32\TAPITdb.mdb database, User table
******
FIELDS ARE MATCHED THE FOLLOWING WAY:
User First Name = first
                  (Field0 UserFirstName)
User Last Name = last
                  (Field1 UserLastName)
User Authorization Code = auth
                        (Field2 UserAuthCode)
User Extension = ext1
                  (Field3 Extension)
User Extension = ext2
                  (Field4 Extension)
*****
***Rejected rec # 1***last is empty. This a required field in User table and cannot be left empty.
***Rejected rec # 2***Extension: "2830" already exists in a database and has not been saved in TAPIT
***Rejected rec # 3***auth: "40*#89" contains illegal characters. It can only contain digits and letters.
Import to the User table from file C:\CVSfiles\User.csv is completed
17 total CSV file records.
14 imported records.
3 rejected records.
```

15. To view rejected records click on the View Rejected Records CSV File button

View Rejected Records - File: 030205212456_Rejected.csv

View Rejected Records CSV File

030205212456_Rejected.csv file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.

16. The following screen opens up. Click on **View File**

💐 Tapit Import 1.0.23 - Rejected Records CSV File

To Revise the Rejected Records file:

STEP 1 Click on the 'Instructions' button. The 'Instructions.txt' file contains guidelines on how to correct the Rejected Records file.

STEP 2 Click on the 'View File' button to open the rejected records file. Follow the guidelines from 'Instructions.bt' file and revise this file.

Cancel

View Instructions

View File

X

The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).

The entries in bold are the entries to be corrected - the log file above has a list of these entries and information

on what needs to be corrected.

The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

"Rec Number","last","first","auth","ext1","ext2" "1","'',"Larry","","2827","2834" "2","Jones","Dianne","","**2830**","2835" "3","Dill","Connor","**40*****#89**","","48014"

```
The revised Rejected Records file:
"Rec Number","last","first","auth","ext1","ext2"
"1",''Brown'',"Larry","","2827","2834"
"2","Jones","Dianne","",'2855","2835"
"3","Dill","Connor","402589","","48014"
```

The Rejected Records file needs to be saved in Notepad under the same name.

17. Now you can import rejected records again by clicking on Import Revised Rejected Records CSV File.

Import REVISED Rejected Records CSV File

18. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

1	Tapit Import
	This action will IMPORT C:\Program Files\Tapit Import\LogFiles\030205200609_Rejected.csv file to TAPIT. If you have revised 030205200609_Rejected file and saved changes under the same name and path (C:\Program Files\Tapit Import\LogFiles\030205200609_Rejected.csv) then click on OK. Otherwise click on CANCEL and open the file for correction using the 'View Rejected CSV File' button.
	Cancel
T	APIT Import Wizard will import records from the Rejected Records file.

	1 0	U	<u> </u>
Tapit Import			X
Import Completed, Plea	se see Import.Log for m	ore informati	on.
[OK]		

Click on OK.

20. The Import screen changes to reflect the new import results (import from Rejected Records csv file). In our example:

"Total text (csv) records: 3" - total number of text records in the Rejected Records csv file.

"Total records imported to 'User' table:3" – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.

TAPIT Import Wizard 1.1.0							
Import	1						
USERS IMPORT							
Total text (csv) records: 3	Total records imported to 'User' table: 3	Total records rejected: 0					
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 03020521249 View Import L 030205212456_Log log file is located in: C:\Phogram Files\Tapit Import\LogFiles\ folder.	56_Log.log .OG File					
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV formal. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Reco	ords CSV File					
Cancel	<< Back Next >>	Finish					

Your import is completed.

21. You can go to TAPIT and view Users screen.

🗉 Users / Departments								
Print Nets Ext				New	Save	Pelete		
Hierarchy Departments	Users			User				
Sort Bu:				1				
Lloor	Department	Auth Code	Extension	User	Last Na	me / Con	npany	
0.061	Deparament	Adin. Code	Enternation	Brad	y .			
Brady David			2831 🔺	User	First Na	me		
Brady David			2830	David	4			
Brown Larry			2834	further and		Code		
Brown Larry			2827	Autric	nzation	Code		
Chuang Daniel		401268	48017					
Constant Daniel			2836	Surch	harge Pe	er Minute	Surcharge Per Call	Multiplier %
Darling Tyler		401885	48013	0			0	0
Davis Ben		404852	48015	P			P	10
Dermack Ashley			2837					
Dill Connor		402589	48014	Depa	rtment			
Evans Erick			8774				-	
Jones Dianne			2856					
Jones Dianne		101000	2835				Extension(s)	
Kroeger Ann		401565	48018		Add >>		2830	
McDonald Joe			2833			_	2831	
Nelle Metthews		401507	2020					
Rolle Matthew Dulkite Abiaei		401507	40019		emme	~		
Smith Hallan			2000		all the C			
Smith Hellen			2032					
Sullivan Andrew		401596	49020					
Longinsen Annielle		ALC: NOT						

Importing Users WITH Departments

Using the same csv file to import Users and Departments

Users and Departments can be imported from the same CSV file.

The CSV file has to contain User information as well as list **Department Names** for the corresponding Users (see the example CSV file below).

Example of a User\Department CSV file displayed in MS Excel:

🛛 Microsoft Excel - UserDeptName.csv							
Eile Edit View Insert Format Tools Data Window Help							
	🖻 🖬 🔒) 🖨 🖪	🌮 🖻 🖡	L KA 🖌 🧯	Σ f _*	🛃 📶 🕄 💝 🗛 Arial	
K18 =							
	A	В	С	D	E	F	
1	first	last	auth	ext1	ext2	dept	
2	David	Brady		2830	2831	ACCOUNTING	
3	Hellen	Smith		2829	2832	ACCOUNTING	
4	Joe	McDonald		2828	2833	IT	
5	Larry	Jones		2827	2834	IT	
6	Dianne	Chiera		2830	2835	IT	
7	Daniel	Constant			2836	Human Resources	
8	Ashley	Dermack			2837	Human Resources	
9	Thomas	Timothy			2838	Customer Service	
10	Abigail	Pulkita			2868	Customer Service	
11	Erick	Evans			8774	Customer Service	
12	Tyler	Darling	401885		48013		
13	Connor	Dill	403489		48014	Sales	
14	Ben	Davis	404852		48015	Sales	
15	Daniel	Chuang	401268		48017	Sales	
16	Ann	Kroeger	401565		48018	Sales	
17	Matthew	Nolle	401587		48019	Sales	
18	Andrew	Sullivan	401586		48020	Sales	
10						ٹے 📃 🗌	

In our example: Line 1 is the header.

Each line, except line 12, lists a Department Name (dept) corresponding to a User. Department Names associate Users with the Departments.

Format of a User\Department CSV file

Example of a User\Department CSV file displayed in MS Excel:
	Microsoft Excel - UserDeptName.csv								
	<u>File E</u> dit <u>V</u>	iew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ool	s <u>D</u> ata <u>W</u> in	dow <u>H</u> elp				
ΙD	൙ 🖪 d	140	🖻	ω - Q	Σf_{*}) <u> </u> 😨	Arial		• 10 • B <i>I</i>
1 —	K30	· <u></u> .	=	-			. 11		
	A	В	С	D	E	F	G	Н	
1	first	last	auth	ext1	ext2	surcharge	surcharge	multiplier	dept
2	David	McDonald		2830	2831				ACCOUNTING
3	Hellen	Smith		2830	2832	0.2			ACCOUNTING
4	Joe			2828	2833				IT
5	Larry	Jones		2827	2834				IT
6	Dianne	Chiera		2826	2835				IT
7	Daniel	Constant		A143	2836				Human Resources
8	Ashley	Dermack			2837				Human Resources
9	Thomas	Timothy			2838				Customer Service
10	Abigail	Pulkita			2868				Customer Service
11	Erick	Evans			8774				Customer Services
12	Tyler	Darling	401885		48013	\$0.05	0.8	5.00%	
13	Connor	Dill	401885		48014				Sales
14	Ben	Davis	UPSCOM		48015				Sales
15	Daniel	Chuang	99**#8		48017				Sales
16	Ann	Kroeger	401565		48018				Sales
17	Matthew	Nolle	401587		48019				Sales
18	Andrew	Sullivan	401586		48020				Sales
10									

Line No.	Is it going to be imported to TAPIT?	Why is the User record rejected?
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.
Line 2	YES	
Line 3	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.
Line 4	NO	The required USER filed Last Name is left blank.
Lines 5-6	YES	
Line 7	NO	The Extension TAPIT field accepts only digits. The A143 is not a correct format because it contains a letter.
Lines 8-13	YES	
Line 14	NO	The Authorization Code TAPIT filed does not accept any duplicates. Authorization Code 401885 already exists in TAPIT because this code has already been used for user on line 13 and line 13 has already been imported.
Line 15	NO	The Authorization Code TAPIT field accepts only digits and letters. The 99**#8 is not a correct format because it contains other characters (*#).
Lines 16-18	YES	

NOTE:

• Line 11 – Department Name has a typo. It is listed as Customer Services instead of Customer Service.

As a result Customer Services will be created as an additional Department and the user from line 11 (Erick Evans) will be associated with Customer Services instead of Customer Service.

• If a user has **multiple extensions** they need to be listed on the same line with this user (as shown above lines 2 through 5).

Using Import Wizard

1. Start **TAPIT Import Wizard** by clicking on **START/TAPIT/TAPIT Import**. **TAPIT User/Client Import** screen appears.



Click on Next.
 Select Destination Table screen appears.
 Select IMPORT destination TAPIT table: in this example we are importing Users.

CAPIT Import Wizard 1.0.23	
Select Destination Table	
Select IMPORT destination TAPIT table: CLIENTS USERS	
Cancel << Back Next >>	Finish

3. The **Import Departments?** screen is displayed. In our case we want to import Departments and associate them with Users. Click on the **YES** option.

S. TAPIT Import Wizard 1.1.0	. D ×
Import Departments?	
Do you want to import Departments? Image: Click on YES if you want to import Departments corresponding to Users. Departments have to be imported prior to Users. Departments have to be imported prior to Users. Departments have to be imported prior to Users. Departments in the to Users. Departments in the to Users. Departments in the to Users. User Import. When Departments Import is completed this Wizard will continue with User Import. NO Click on NO if you do not want to import Departments.	
Cancel << Back Next >> Finish	

4. Click on Next.

Locate Files screen opens.

This is the first screen of Departments Import. Departments have to be imported prior to Users. When Departments Import is completed this wizard proceeds with Users import.

Enter the Path to the User\Department CSV file, or click on the **Browse** button to find it. Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

 TAPIT Import Wizard 1.0. 	23	LOX
Locate Fil	es	
	DEPARTMENTS IMPORT	
	Import DEPARTMENTS from CSV File:	
	Enter the path to the csv file or click on 'Browse' to find it.	
	C:\csvFiles\UserDeptName.csv Browse	
	Import TO TAPIT Database (tapitdb.mdb) File:	
	Enter the path to the TAPIT database (tapitds.mdb) file or click on 'Browse' to find it.	
	C.\TapiW32\DATA\MAIN\Japido.mdb	
	Bowse	
Cancel	<< Back Next >> Finish	

5. Click on Next

Column Headers screen comes up.

		DEPARTMENTS	IMPORT					
Examples of CSV files Using the same CSV file to import Departments and Users Using two different CSV files to import Departments and Users								
Does the fir	st row contain header?	e Text File Data (max	100 records shown)					
Feet	last	a th	and and	aut?	a reb			
David	McDonald	aum	2930	2021	surch			
Hellen	Smith		2830	2832				
Joe	211011		2828	2833				
Lanv	Jones		2827	2834				
Dianne	Chiera		2826	2835				
Daniel	Constant		A143	2836				
Ashley	Demack.			2837				
Thomas	Timothy			2838				
Abigail	Pulkita			2868				
Erick	Evans			8774				
Tyler	Darling	40	1895	48013	\$0.05			
Connor	Dill	40	1885	49014				
Ben	Davis	UPSCOM		48015				
	Chuang	99	r*#8	48017				
Daniel	Kanagar	40	1565	49018				
Daniel Ann	Niceger		4.60/2	49019				
Daniel Ann Matthew	Nole	40	1987	40010				

You can view first 100 lines of your User\Department CSV file for your reference under **Sample Text** File Data.

Please check if the displayed data reflects the User\Department CSV file (if data is separated into columns properly).

Please note:

Each comma is a beginning of a new column in a Comma Separated text file (CSV). Columns have to be divided by commas (not any other characters).

If commas are a part of a field value they should be enclosed by double quotes i.e. "General Telecom, Inc".

Example:

Our Example.csv file contains following entry: *Simon,Gabriel, "General Telecom, Inc"* This file is displayed in MS Excel in the following format – in three columns.

🔀 Microsoft Excel - example.csv								
	<u>File E</u> dit <u>V</u>	jew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ools <u>D</u> ata <u>W</u> indo					
0	🗅 🚅 🖬 🔒 🖨 🖪 🖤 🐴 🛍 🗠 + 🍓							
	H20	•	=					
	A	В	С					
1 Simon		Gabriel	General Telecom, Inc					
· · ·								

It should also display three columns in TAPIT Import.

	Sample Text File Data (max 100 records shown)								
Simon	Gabriel	General Telecom, Inc							

6. Does the first row contain headers?

Check this option if the first line of your CSV file contains TEXT field names.

Does the first row contain header?

The User\Department CSV, used in our example, contains headers (see **Format of a User\Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns.

7. Click on Next.

The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT file columns.

C TAPIT Import Wizard 1.0	1.23				_ D ×		
Match Fie	elds						
		DEP/	ARTMENTS IMPOR	т			
Total CSV File		Sample Text Fil	e Data (max 100 re	cords shown)	-		
Records:	(C. 1						
17	David	McDonald	auth	293	in ext2		
	Helen	Smith		283			
STEP 1	Joe			282	9		
Select an item from	Lanu	Jones		290	7 -		
'Text File Columns'	· · ·				-		
corresponding field							
name from 'Tapit Database Fields' list	Ta	pit Database Fields	Match Fields	Text File Columns			
	Department Na	me	dept		*		
STEP Z Click on the 'Add		Add matched f	ields to the Imr	ort list			
matched' button	Add matched rields to the import list						
to save this	Departmen	it Name	= dept				
Repeat steps 1, 2							
until all fields are							
matched.							
Each Tapit Field,							
can be matched with							
Column.							
Department Name							
is a required field	•				•		
		Remove it	am from the Im	port list			
	L						
Cancel		<< Back	Next >>	Finish			

8. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

Tapit Database Fields	Match Fields	Text File Columns	
Department Name	💌 💳 dept		•

In our case we only need to match Department Name with a corresponding Text File Column. 9. Click on Add matched fields to the Import List.

Add matched fields to the Import list								
The matched fields appear in the Import List .								
Tapit Database Fields	Match Fields	Text File Columns						
Department Name	💌 💳 dept		•					
Add matched	fields to the Imp	oort list						
Department Name	= dept							

10.

hen all fields are matched the Import Screen is d	isplayed.		
TAPIT Import Wizard 1.0.2	3		
Import	L		
	DEPARTMENT	SIMPORT	
IMPORT	Tapit Database Fields	IMPORT LIST Text File	Columos
Import Wizard imports data the way it is matched in the Import List. Data from the Text File Columns is imported to the	Department Name	= dept	
corresponding Lapit Fields.			
the 'Match Fields' screen. Add/remove the Import List items.			
click on the 'Finish' button.			
	4		
Cancel	<< Back	Next >>	Finish

This screen displays the final field selection for import.

11. Import Wizard imports data the way it is matched in the Import List. If you need to edit the Import List, click on the Back button to go back to the Match Fields screen. Add or Remove rows from the Import List using the Add matched fields to Import list or Remove item form Import list buttons.

Otherwise, click on **Finish** to import.

12. When Department Import is completed, a confirmation message appears.

ImportTapit 🛛 🗙
Import Completed. Please see Import.Log for more information.
<u>ОК</u>

Click on **OK**.

13. Your Department Import is completed.

Import screen display changes.

The top of the screen displays statistics.

Following our example below:

"Total unique (csv) Departments: 6" - there has been 6 unique Department Names found.

"Total records imported to 'Department' table:"4 – 4 Departments were imported

"Total records rejected: 2" - 2 Departments were not imported, because they already exits in TAPIT.

TAPIT Import Wizard 1.1.0							
Import							
	DEPARTMENTS IMPORT						
Total unique (csv) Departments:6	Total records imported to 'Department' table: Total records rejected: 2						
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records and description of rejected records.	View Log Information - File: 022505104409_Log.log View Import LOG File 022505104409_Log.log file is located in: C:\Phojects\ExportImportTapit\LogFiles\ tolder.						
because the Department Names already exits in TAPIT.	Departments import has been completed 2 records have been rejected because the Department Names already exist in TAPIT. Please click on 'Continue with User Import' button to import Users						
Cancel	Cancel Continue with User Import Finish						

If some **records are rejected** that means they already exist in TAPIT. You don't need to import them again.

Log file is a text file that contains information on this import. It resides in a subfolder of the folder where TAPIT Import is installed. If default options were accepted when installing TAPIT Import, this file is located in C:\Program Files\TAPIT Import\LogFiles folder. To view log file click on **View Import LOG file**.

The LOG file opens in Notepad.

The log file produced by our example import:

FIELDS ARE MATCHED THE FOLLOWING WAY:

Department Name = dept (Field8 DeptName)

2 rejected records.

14. You can proceed with User Import.

Click on the **Continue with User Import** button.

Locate Files screen appears. This screen lets you select a different file to import Users. However, in our import example we are importing Departments and Users from the same file.

Click on **I want to import USERS from the same file...** box to check it. The path to the User\Department CSV file appears.

The path to the TAPIT Database is saved from the Department Import and should not be changed.

TAPIT Import Wizard 1.0.23		_D×
Locate Files		
	USERS IMPORT (following the Departments Import) Import USERS from CSV File: I want to import USERS from the same file used to import DEPARTMENTS [C:\csvFiles\UserDeptName.csv] OR, enter the path to the csv file or click on Browse' to find it. C\csvFiles\UserDeptName.csv Browse Import TO TAPIT Database (tapitdb.mdb) File:	
	DVTaoiW32\DATA\MAIN\Jaoi/dx mdb	
Cancel	<< Back Next >> Finish	

15. Click on Next.

Column Headers screen comes up.

This screen is different from what you have seen when importing Departments.

Associate Users with Departments part has been added. Since we've imported only Department Names, Department Name is the only filed that can be used to assign Users to Departments. That is why there is only one option displayed, **Department Name**, and this option is grayed to prevent a user from changing it.

Column	n Headers					
Colum	L L					
USERS IMPORT (following the Departments Import)						
Examples of	CSV files					
Usir	Using the same CSV file to import Departments and Users					
Associate Us	ers with Departments					
Department N	ame is the only field i	imported from Dep	artments.			
This field has	to be used to associa	te Users with Depa	rtments			
C Department	Name To associate User	s with Departments:				
ie Deparament	the CSV file has to	list Users with the correspondence	ponding to them DEPARTI	MENT NAME	ES.	
Dans the fire	Cohend sisters was to					
Doet the lits	of fow contain header?					
	Sample	e Text File Data (n	nax 100 records sh	own)		
first	Sample	e Text File Data (n	ext1	own)	ext2	3. •
first David	Sample last McDonald	e Text File Data (n auth	ext1	own) 2830	est2 28	31
first David Hellen	Sample last McDonald Smith	e Text File Data (n auth	exil	own) 2830 2830	est2 28 28	31 32
first David Hellen Joe	Sample last McDonald Smith	e Text File Data (n auth	exil	own) 2830 2830 2828	est2 28 28 28	31 32 33
first David Hellen Joe Lany	Sample Iast McDonald Smith Jones	e Text File Data (n auth	ext1	own) 2830 2828 2828 2827	est2 28 28 28 28 28	31 32 33 34
first David Hellen Joe Lany Dianne	Sample Iast McDonald Smith Jones Chiera	e Text File Data (n auth	ext1	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28	31 32 33 34 35
first David Hellen Joe Lany Dianne Daniel	Sample last McDonald Smith Jones Chiera Constant	e Text File Data (n auth	ext1	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28	31 32 33 34 35 36
first David Hellen Joe Lany Dianne Daniel Ashley	Sample last McDonald Smith Jones Chiera Constant Demack	e Text File Data (n auth	ext1	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28 28 28 28	31 32 33 34 35 36 37
first David Hellen Joe Lany Dianne Daniel Ashley Thomas	Sample last McDonald Smith Jones Chiera Constant Demack Timothy	e Text File Data (n	ext1	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28 28 28 28 28	34 33 32 33 34 35 36 37 38
first David Hellen Joe Lany Dianne Daniel Ashley Thomas Abigail	Sample Iast McDonald Smith Jones Chiera Constant Demack Timothy Pulkita	e Text File Data (n	ext1	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28 28 28 28 28	31 31 32 33 32 33 34 34 35 36 36 37 38 58 58
first David Hellen Joe Lany Dianne Daniel Ashley Thomas Abigail Erick	Sample last McDonald Smith Jones Chiera Constant Demack Timothy Pulkita Evans	e Text File Data (n	ext1	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28 28 28 28 28	31 31 32 33 34 35 36 37 38 68 74
first David Hellen Joe Lany Dianne Daniel Ashley Thomas Abigail Erick Tyler	Sample last McDonald Smith Jones Chiera Constant Demack Timothy Pulkita Evans Darling	e Text File Data (n	401885	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28 28 28 28 28	34. 31 32 33 34 35 36 37 38 68 74 13 \$(_ 1)
first David Hellen Joe Lany Dianne Daniel Ashley Thomas Abigail Erick Tyler	Sample Iast McDonald Smith Jones Chiera Constant Demack Timothy Pulkita Evans Darling	e Text File Data (n	401835	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28 28 28 28 28	34 31 32 33 34 35 36 37 38 68 74 13 \$(
first David Hellen Joe Lany Dianne Daniel Ashley Thomas Abigal Erick Tyler	Sample McDonald Smith Jones Dhiera Constant Demack Timothy Pulkita Evans Darling	e Text File Data (n	401835	own) 2830 2830 2828 2827 2826	est2 28 28 28 28 28 28 28 28 28 28 28 28 28	34 31 32 33 33 34 35 36 37 38 68 74 13 \$(~~

16. Since we are using the same CSV file and the Wizard already knows that it contains headers the **Does the first row contain header?** box is checked.

17. Click on Next.

The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT fields.

Match Field Records to IMPORT: 17	inst	ISERS IMPOR Sample Text	<mark>T (following</mark> File Data (r	the De	partments Impo	ort)	
Records to IMPORT: 17	irst	ISERS IMPOR Sample Text	T (following File Data (r	the De max 100	partments Impo	ort)	
Records to IMPORT: 17	irst Javid	Sample Text	File Data (r	max 100	records show		
17	irst Javid	last) records shown	1)	
17	irst Javid	last				~	
) avid	MaDanald	aum	1	exti	2020	CXIZ -
	lalan.	Revenad				2830	
CTED 1	tellen	Smm				2830	
Siler I	oe	Inner				2828	
'Text File Columns'	(¹)	-innes				16/1	- E
list and a							-
corresponding field			Manak	Rial de	_		
name from 'Tapit Database Fields' list	Tapit Da	tabase Fields	Match	Fields	5 Text File	Columns	
Database Fields list.	User Extension		· =	ext2			-
STEP 2	TAPIT 'DEPARTN	IENT NAME' fiel	d has to he	matche	d with the corre	snonding fiel	d in a
Click on the 'Add	THE DEFINITION	text file to a	ssociate U	sers with	h Departments	sponding ner	
to save this							
selection for Import.		add matched	l fields to	o the I	mport list		
Repeat steps 1, 2	Department Name			- dest			
until all helds are	User First Name	1		 Gept first 			
matched.	User Last Name			- Inot			
Each Tapit Field,	User Authorization	Code		- auth			
except Extension	User Surcharge P	er Minute		- euro	are per Minute		
can be matched with	User Surcharge P	er Call		= surch	arge per Call		
UNLY one Text File	User Multiplier (pe	centl		- multi	olier		
Conumit	User Extension	horn)		= est1	p#04		
	User Extension			= ext2			
Extension Field	CONTENSION			01112			
is a required field	•						
	Remove item from the Import list						
L							
	1				1	1	
Cancel	<<	Back	Ne	xt >>		Finish	

18. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

	Tapit Database Fields	Match Fields	Text File Columns
	User Extension	• = ext2	
19.	Click on Add matched fields to the	Import List.	
	Add matched	fields to the Imp	oort list

The matched fields appear on the Import List.

Tapit Database Fields	Match Fie	elds Text File Columns			
User Extension	💌 💳 [ex	d2 💌			
TAPIT 'DEPARTMENT NAME' field ha text file to asso	CAPIT 'DEPARTMENT NAME' field has to be matched with the corresponding field in a text file to associate Users with Departments				
Add matched fi	elds to th	ne Import list			
Department Name	=	dept			
User First Name	=	first			
User Last Name	=	last			
User Authorization Code	=	auth			
User Surcharge Per Minute	=	surcharge per Minute			
User Surcharge Per Call	=	surcharge per Call			
User Multiplier (percent)	=	multiplier			
User Extension	=	ext1			
User Extension	=	ext2			

WHEN MATCHING USER FIELDS

The field associating Users with Departments has to be matched. In our case it is the Department Name field.

User Last Name has to be included in the Import List. This TEXT field (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

All other TAPIT fields can be matched with only one TEXT field (column).

20. When all fields are matched, click on **Next**.

TAPIT Import Wizard 1.0. Import	23		
	USERS IMPORT (following the	Departments Import)	
IMPORT	Tapit Database Fields	IMPORT LIST Text File Columns	
Import Wizard imports	Department Name	= dept	
matched in the Import	User First Name	= first	
List.	User Last Name	= last	
Data from the Taut	User Authorization Code	= auth	
File Columns is	User Surcharge Per Minute	 surcharge per Minute 	
imported to the	User Surcharge Per Cal	 surcharge per Call 	
corresponding Tapit	User Multiplier (percent)	 multiplier 	
Fields.	User Extension	= ext1	
If you need to edit	User Extension	= ext2	
the IMPORT LIST			
click on the '< <back' button to go back to the 'Match Fields' screen. Add/remove the Import List items.</back' 			
TO IMPORT NOW click on the 'Finish' button.			
	4		2
Cancel	<< Back	Next >> Finish	1

This screen displays the final field selection for import.

TAPIT Import Wizard imports data the way it is matched in the Import List.

If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. Add or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove** item form Import list buttons.

Otherwise, click on **Finish** to import.

21. When import is completed, a confirmation message appears.

ImportTapit X
Import Completed. Please see Import.Log for more information.
ОК

Click on OK.

22. The Import screen changes.

TAPIT Import Wizard 1.1.0		_D×
Import		
USERS	IMPORT (following the Departments Import)	
Total text (csv) records: 17	Total records imported to 'User' table: 12 Total records rejected: 5	
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 022505114410_Log.log View Import LOG File 022505114410_Log.log file is located in: C:\Projects\ExportImportTapit\LogFiles\ tolder. View Rejected Records - File: 022505114410_Rejected.csv	
Rejected Records File Click on the View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records CSV File D22505114410_Rejected.csv file is located in: C:\Projects\ExportImportTapit\LogFiles\ folder. How to REVISE Rejected Records CSV file Import REVISED Rejected Records File: 022505114410_Log.csv Import REVISED Rejected Records CSV File	
Cancel	<< Back Next >> Finish	

Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 17 total TEXT records, 12 TEXT records were successfully saved (imported) into the TAPIT Database. 5 TEXT records were rejected (were not imported).

Total text (csv) records: 17	Total records imported to "User' table: 12	Total records rejected: 5

23. To find out more about rejected records click on the View Import Log File button.

View Log Information - File: 082304103015_Log.log		
View Import LOG File		
082304103015_Log.log file is located in: C:\Projects\ExportImportTapit\LogFiles\ folder.		

The log file contains two parts: the Department part and the Users part.

Scroll down to see the Users Import part.


```
Import FROM CSV file C:\csvFiles\UserDeptName.csv
Import TO the C:\TAPITW32\DATA\MAIN\TAPITDB.MDB database, User table
FIELDS ARE MATCHED THE FOLLOWING WAY:
Department Name = dept (Field8 DeptName)
User First Name = first
                   (Field0 UserFirstName)
User Last Name = last
                   (Field1 UserLastName)
User Authorization Code = auth
                         (Field2 UserAuthCode)
User Surcharge Per Minute = surcharge per Minute
                                          (Field5 UserSurchargePerMinute)
User Surcharge Per Call = surcharge per Call
                                    (Field6 UserCallSurcharge)
User Multiplier (percent) = multiplier
                              (Field7 UserMultiplier)
User Extension = ext1
                   (Field3 Extension)
User Extension = ext2
                   (Field4 Extension)
(why records were rejected
```

rec # matches the record number in a rejected file csv)

Rejected rec # 1Extension: "2830" already exists in a database and has not been saved in TAPIT ***Rejected rec # 2***last is empty. This a required field in User table and cannot be left empty. ***Rejected rec # 3***Extension: "A143" contains illegal characters. Only digits are allowed. and has not been saved in TAPIT ***Rejected rec # 4***auth: "401885" already exists in TAPIT database, User table

(Import statistics)

24. To view rejected records click on the View Rejected Records CSV File button



25. The following screen opens up. Click on View File



The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).

The entries in bold are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.

The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

"Rec Number", "last", "dept", "first", "surcharge per Minute", "surcharge per Call", "multiplier", "auth", "ext1", "ext2"

"1","Smith","ACCOUNTING ","Hellen","0.2","","","","2830","2832"

"2","","IT","Joe","","","","","2828","2833"

"3", "Constant", "Human Resources", "Daniel", "", "", "", ", "A143", "2836"

"4","Dill","Sales","Connor","","","","401885","","48014"

"5","Chuang","Sales","Daniel","","","","99**#8 ","","48017"

The same Rejected Records file after corrections:

"Rec Number", "last", "dept", "first", "surcharge per Minute", "surcharge per

Call", "multiplier", "auth", "ext1", "ext2"

"1","Smith","ACCOUNTING ","Hellen","0.2","","","","2855","2832"

"2","**Brown**","IT","Joe","","","","","2828","2833"

"3", "Constant", "Human Resources", "Daniel", "", "", "", "**4143**", "2836"

"4","Dill","Sales","Connor","","",","401995","","48014"

"5","Chuang","Sales","Daniel","","","","41998","","48017"

The Rejected Records file needs to be saved in Notepad under the same name.

26. Now you can import rejected records again by clicking on Import Revised Rejected Records CSV

File.

Import REVISED Rejected Records CSV File

27. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

Tapit Import
This action will IMPORT C:\Projects\ExportImportTapit\LogFiles\022505114410_Rejected.csv file to TAPIT. If you have revised 022505114410_Rejected file and saved changes under the same name and path (C:\Projects\ExportImportTapit\LogFiles\022505114410_Rejected.csv) then click on OK. Otherwise click on CANCEL and open the file for correction using the 'View Rejected CSV File' button.
OK Cancel

28. TAPIT Import Wizard will import records from the Rejected Records file. When import is finished it will display the following message:

Tapit Import		×
Import Completed. Please see Im	port.Log for more	information.
C. OK		

Click on OK.

29. The Import screen changes to reflect the new import results (import from Rejected Records csv file). In our example:

"Total text (csv) records: 5" - total number of text records in the Rejected Records csv file.

"Total records imported to 'User' table:"5 – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.

S. TAPIT Import Wizard 1.1.0		_D×
Import	l	
USERS	IMPORT (following the Departments Import)	
Total text (csv) records: 5	Total records imported to 'User' table: 5 Total records rejected: 0	
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 022505114410_Log.log View Import LOG File 022505114410_Log.log file is located in: C:\Phojects\ExportImportTapit\LogFiles\ folder. There are no rejected records - the csy file has not been created	
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records CSV File	
Cancel	<< Back Next>> Finish	

Your import is completed.

30. You can go to TAPIT and view Users/Departments screen.

NOTE:

In our example one of the Users records had a typo in the Department Name. Instead of Customer Service it was spelled Customer Services.

To demonstrate how such error can impact import results we did not correct it.

As a result we have imported two departments Customer Service and Customer Services instead of one.

😫 Users / Departments	
Print Relp Exit	
Hierarchy Departments Users	
Sort By:	
Department	Parent
ACCOUNTING	
Customer Service	
Customer Services	
IT Human Resources	
Sales	

Hierarchy Departments	Utert			User
Sort By: User	Department	Auth. Code	Extension	User Last Name / Company
Brown Joe Brown Joe Chiera Dianne Chiera Dianne Chuang Daniel Constant Daniel Darling Tyler Davis Ben Dermack Ashley Dill Connor Evans Erick Jones Larry Jones Larry Kroeger Ann McDonald David Nolle Matthew	IT IT IT Sales Human Resource Sales Human Resource Sales Customer Service IT Sales ACCOUNTING ACCOUNTING Sales	41998 401885 UPSCOM 401995 401565 401587	2833 2828 2826 2835 48017 2835 48013 48013 48015 2837 48014 8774 2834 2837 48018 2830 2831 48019	User First Name Daniel Authorization Code Surcharge Per Call Multiplier % Department Human Resources Add >> Extension(s) Add Remove <<

Using different csv files to import Users and Departments

You have two csv files: User csv file and Department csv file.

<u>CASE 1</u> - Users are associated with Departments via Department Names

User csv file contains **User information** as well as lists **Department Names** (and optionally Department Ids) for the corresponding Users.

Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help Image: Bile Edit View Insert Format Tools Data Window Help
□ □ <th□< th=""> <th□< th=""> <th□< th=""></th□<></th□<></th□<>
K27Image: Second se
ABCDEFG1firstlastauthext1ext2deptdept no.2DavidBrady28302831ACCOUNTING13HellenSmith28292832ACCOUNTING14JoeMcDonald28282833IT225LarryJones28272834IT226DianneChiera28302835IT227DanielConstant28302835IT238AshleyDermack22837Human Resources339ThomasTimothy2838Customer Service4410AbigailPulkita2868Customer Service44
1firstlastauthext1ext2deptdept no.2DavidBrady28302831ACCOUNTING13HellenSmith28292832ACCOUNTING14JoeMcDonald28282833IT25LarryJones28272834IT26DianneChiera28302835IT27DanielConstant22836Human Resources38AshleyDermack2837Human Resources39ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
2DavidBrady28302831ACCOUNTING13HellenSmith28292832ACCOUNTING14JoeMcDonald28282833IT25LarryJones28272834IT26DianneChiera28302835IT27DanielConstant28302836Human Resources38AshleyDermack2837Human Resources39ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
3HellenSmith28292832ACCOUNTING14JoeMcDonald28282833IT225LarryJones28272834IT226DianneChiera28302835IT227DanielConstant28302836Human Resources338AshleyDermack2837Human Resources339ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
4JoeMcDonald28282833IT225LarryJones28272834IT226DianneChiera28302835IT227DanielConstant2836Human Resources338AshleyDermack2837Human Resources339ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
5LarryJones28272834IT226DianneChiera28302835IT227DanielConstant2836Human Resources338AshleyDermack2837Human Resources339ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
6DianneChiera28302835IT227DanielConstant2836Human Resources338AshleyDermack2837Human Resources339ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
7DanielConstant2836Human Resources338AshleyDermack2837Human Resources339ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
8AshleyDermack2837Human Resources39ThomasTimothy2838Customer Service410AbigailPulkita2868Customer Service4
9 Thomas Timothy 2838 Customer Service 4 10 Abigail Pulkita 2868 Customer Service 4
10 Abigail Pulkita 2868 Customer Service 4
11 Erick Evans 8774 Customer Service 4
12 Tyler Darling 401885 48013
13 Connor Dill 403489 48014 Sales 5
14 Ben Davis 404852 48015 Sales 5
15 Daniel Chuang 401268 48017 Sales 5
16 Ann Kroeger 401565 48018 Sales 5
17 Matthew Nolle 401587 48019 Sales 5
18 Andrew Sullivan 401586 48020 Sales 5

Department csv file contains a list of all the departments – **Department Names** (and optionally Department Ids).

M	licrosoft Excel - Dept	IdName.cs	۷.
	<u>File E</u> dit <u>V</u> iew Inser	t F <u>o</u> rmat <u>T</u>	jools
	🖻 🖶 🔒 🖉	🗈 🎸 🕻	e
	E11 💌	=	
	A	В	
1	dept	dept no.	
2	ACCOUNTING	1	
3	IT	2	
4	Human Resources	3	
5	Customer Service	4	
6	Sales	5	
7			7

If User csv file contains all Department Names that you want to import (as displayed in our example screens above) you can use the same file to import both Users and Departments (see section **Using the same csv file to import Users and Departments** above).

However, if your Department csv file contains more departments than listed throughout the User csv file

(see the example screen below) then you need to follow directions in this section.

MM	licrosoft Excel - Depl	IdName.csv
	<u>File E</u> dit <u>V</u> iew <u>I</u> nser	t F <u>o</u> rmat <u>T</u> ool
	🖻 🖶 🔒 🖉), 🌱 🖻 🛍
	114 💌	=
	A	В
1	dept	dept no.
2	ACCOUNTING	1
3	IT	2
4	Human Resources	3
5	Customer Service	4
6	Sales	5
7	Marketing	6
0		

This Department csv file lists Marketing as a Department Name. Marketing department is not found in the User csv file. If you want to import Marketing then you have to use both files to import Users and Departments.

<u>CASE 1</u> - Users are associated with Departments via Department Ids

User csv file contains **User information** as well as lists **Department Ids** (the Ids are not accompanied by Department Names) for the corresponding Users.

M 14	Microsoft Excel - UserDeptId.csv							
	🖹 File Edit View Insert Format Tools Data Window Help							
0	🖻 🖬 🔒) 🖨 🖪	🌮 🖻 🖻	w - (Σ <i>f</i> *	24 🛍 🛛		
_	H7 =							
	A	В	С	D	E	F		
1	first	last	auth	ext1	ext2	dept no.		
2	David	Brady		2830	2831	1		
3	Hellen	Smith		2829	2832	1		
4	Joe	McDonald		2828	2833	2		
5	Larry	Jones		2827	2834	2		
6	Dianne	Chiera		2830	2835	2		
7	Daniel	Constant			2836	3		
8	Ashley	Dermack			2837	3		
9	Thomas	Timothy			2838	4		
10	Abigail	Pulkita			2868	4		
11	Erick	Evans			8774	4		
12	Tyler	Darling	401885		48013			
13	Connor	Dill	403489		48014	5		
14	Ben	Davis	404852		48015	5		
15	Daniel	Chuang	401268		48017	5		
16	Ann	Kroeger	401565		48018	5		
17	Matthew	Nolle	401587		48019	5		
18	Andrew	Sullivan	401586		48020	5		
40						Z		

Department csv file contains a list of all the departments – **Department Names** and **Department Ids** (both are required in this case).

M	licrosoft Excel - Dept	tIdName.cs	¥
	<u>File E</u> dit <u>V</u> iew Inser	t F <u>o</u> rmat <u>I</u>	ool
	🖻 🔒 🔒 🖉) 🌾 🖻	(i)
_	E11 💌	=	
	A	В	
1	dept	dept no.	
2	ACCOUNTING	1	
3	IT	2	
4	Human Resources	3	
5	Customer Service	4	
6	Sales	5	
7			2

If this description matches your csv files, then please follow import directions from this section.

Format of a User CSV file

	Example of a I	User CSV file	displayed in N	AS Excel:
--	----------------	---------------	----------------	-----------

	🔀 Microsoft Excel - UserDeptId.csv								
Eile Edit View Insert Format Tools Data Window Help									
🗋 🚅 🔚 🚑 🥘 🔃 🚏 🗈 🛍 🖘 - 🍓 Σ 🍂 🛃 🛍 😨 🐥 Arial 🛛 - 10 -									
K4 v =									
	A	В	С	D	E	F	G	Н	
1	first	last	auth	ext1	ext2	surcharge	surcharge	multiplier	dept no.
2	David	McDonald		2830	2831				1
3	Hellen	Smith		2830	2832	0.2			1
4	Joe			2828	2833				2
5	Larry	Jones		2827	2834				2
6	Dianne	Chiera		2826	2835				2
7	Daniel	Constant		A143	2836				3
8	Ashley	Dermack			2837				3
9	Thomas	Timothy			2838				4
10	Abigail	Pulkita			2868				4
11	Erick	Evans			8774				4
12	Tyler	Darling	401885		48013	\$0.05	0.8	0.50%	
13	Connor	Dill	401885		48014				5
14	Ben	Davis	UPSCOM		48015				5
15	Daniel	Chuang	99**#8		48017				5
16	Ann	Kroeger	401565		48018				5
17	Matthew	Nolle	401587		48019				5
18	Andrew	Sullivan	401586		48020				5
10									

Line No.	Is it going to be imported to TAPIT?	Why is the User record rejected?
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.

Line 2	YES		
Line 3	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.	
Line 4	NO	The required USER filed Last Name is left blank.	
Lines 5-6	YES		
Line 7	NO	The Extension TAPIT field accepts only digits. The A143 is not a correct format because it contains a letter.	
Lines 8-13	YES		
Line 14	NO	The Authorization Code TAPIT filed does not accept any duplicates. Authorization Code 401885 already exists in TAPIT because this code has already been used for user on line 13 and line 13 has already been imported.	
Line 15	NO	The Authorization Code TAPIT field accepts only digits and letters. The 99**#8 is not a correct format because it contains other characters (*#).	
Lines 16-18	YES		

NOTE:

- If a user has **multiple extensions** they need to be listed on the same line with this user (as shown above lines 2 through 5).
- Line 12 User Tyler Darling is not assigned to any department.

Format of a Department CSV file

Example of a Department CSV file displayed in MS Excel:

Microsoft Excel - DeptIdName.csv					
	<u>File E</u> dit <u>V</u> iew Inser	t F <u>o</u> rmat <u>T</u> ool			
2	🚔 🖶 🔒 🖨 🕻), 🌱 🖻 🛍			
	E11 💌	=			
	A	В			
1	dept	dept no.			
2	ACCOUNTING	1			
3	IT 2				
4	Human Resources 3				
5	Customer Service 4				
6	Sales	5			
7		<u>لے</u>			

Line 1 - text columns headers -it is not going to be imported to TAPIT. Line 2 - 6 are all going to be imported, provided none of the Department Names exists in TAPIT.

Using Import Wizard

1. Start **TAPIT Import Wizard** by clicking on **START/TAPIT/TAPIT Import**. **TAPIT User/Client Import** screen appears.



Click on Next.
 Select Destination Table screen appears.
 Select IMPORT destination TAPIT table: in this example we are importing Users.

S. TAPIT Import Wizard 1.0.23	_ D ×
Select Destination Table	
Select IMPORT destination TAPIT table: CLIENTS USERS	
Cancel << Back Next >> Finish	

3. The **Import Departments?** screen is displayed. In our case we want to import Departments and associate them with Users. Click on the **YES** option.

S. TAPIT Import Wizard 1.1.0	_D×
Import Departments?	
Do you want to import Departments? Image: Click on YES if you want to import Departments corresponding to Users. Departments have to be imported prior to Users. Click on Next to import Departments. Image: Click on YES if you want to import Departments corresponding to Users. Click on Next to import Departments. Image: Click on YES if you want to import Departments. Image: Click on Next to import Departments. Image: Click on Next to import Departments. Image: Click on ND if you do not want to import Departments.	
Cancel << Back Next >> Finish	

4. Click on Next.

Locate Files screen opens.

This is the first screen of Departments Import. Departments have to be imported prior to Users. When Departments Import is completed this wizard proceeds with Users import.

Enter the Path to the Department CSV file, or click on the **Browse** button to find it. Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

TAPIT Import Wizard 1.1.0			
Locate Files			
	-		
		DEPARTMENTS IMPORT	
	Import DEPARTMENTS	from CSV File:	
	Enter the path to the cay file or o	lick on 'Browse' to find it.	
	C:\csvFiles\DeptidName.csv		Bunna
			DIONSE
	Import TO TAPIT Datab	ase (tapitdb.mdb) File:	
	Enter the path to the TAPIT datab	ase (tanitely radh) file or elick on "Resume" to	ford 2
	Enter the pain to the TAVITI datab	ase (rapirob.mob) ne or bick on browse ro	[]
	C:\Tapkw32\DATA\MAIN\TAPI	TOB.MDB	Browse
Cancel	<< Back	Next >>	Finish

5. Click on Next

Column Headers screen comes up.

APIT Import Wizard	1.1.0			
Column H	leaders			
		DEPARTM	NTS IMPORT	
Examples of CS1	V files			
Using t De	he same CSV file epartments and U	to import sers	Using two different CSV files Departments and Us	s to import ers
Does the first ro	w contain header?			
	Samp	le Text File Data	(max 100 records shown)	
dept	dept no.			
ACCOUNTING		1		
IT		2		
Human Resources		3		
Customer Service		4		
Sales		5		
Canc	el	<< Back	Next >>	Finish

You can view first 100 lines of your Department CSV file for your reference under **Sample Text File Data**.

Please check if the displayed data reflects the Department CSV file (if data is separated into columns properly).

Please note:

Each comma is a beginning of a new column in a Comma Separated text file (CSV). Columns have to be divided by commas (not any other characters).

If commas are a part of a field value they should be enclosed by double quotes i.e. "General Telecom, Inc".

Example:

Our Example.csv file contains following entry: *Simon,Gabriel, "General Telecom, Inc"* This file is displayed in MS Excel in the following format – in three columns.

ž	🗙 Microsoft Excel - example.csv					
	<u>File E</u> dit <u>V</u>	jew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ools <u>D</u> ata <u>W</u> indo			
0	🖻 🔒 🔒) 🖨 🖪	+ 🔁 🛍 🖏			
	H20	•	=			
	A	В	С			
1	Simon	Gabriel	General Telecom, Inc			
· · ·						

It should also display three columns in TAPIT Import.

Sample Text File Data (max 100 records shown)					
Simon	Gabriel	General Telecom, Inc			

6. Does the first row contain headers?

Check this option if the first line of your CSV file contains TEXT field names.

Does the first row contain header?

The Department CSV, used in our example, contains headers (see **Format of a Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns.

7. Click on Next.

The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT file columns.

C. TAPIT Import Wizard 1.1	.0				=D×
Match Fie	lds				
		DEP	ARTMENTS IMPOR	π	
Total CSV File		Sample Text Fi	le Data (max 100 re	cords shown)	-
Records:	dept	dept.no	Earld 2	Field 2	Link a
5	ACCOUNTING	dept no.	1	riciu a	
	IT		2		
STEP 1	Human Resources		3		
'Text File Columns'	 Lassomer Service 		4		· • -
list and a					
name from 'Tapit	Tapit Dat	abase Fields	Match Fields	Text File Columns	
Database Fields' list.	Department Id		 dept no. 		•
STEP 2		dd matched	Colde to the Ter	eest liet	
matched' button	^	du matcheu	nerus to the mi	port list	
to save this relection for Import	Department Name		= dept		
Repeat steps 1, 2	Department Id		= dept no.		
until all heids are matched.					
Each Tanit Field					
can be matched with					
ONLY one Text File					
Column.					
Department Name					
is a required field					•
		Romovo it	on from the Im	nort list	
		Kentove It	em from the Im	porcense	
Cancel	1 11	Back	Next >>	Einich	1
Cancer		Juck	NEAL >>	P10050	

8. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

Tapit Database Fields	Match Fields	Text File Columns	
Department Id	💌 💻 dept no.		In our

case we only need to match Department Name with a corresponding Text File Column.

9. Click on Add matched fields to the Import List.



The matched fields appear in the **Import List**.

Tapit Database Fields 🛛 🕅	atch Fie	elds _{Tex}	t File Columns		
Department Id	• = de	pt no.			
Add matched fields to the Import list					
Department Name	=	dept			
Department Id	=	dept no.			

In our example User csv file contains ONLY Department Ids (Users are associated with Departments via Department Ids) that is why we need to import data to both Department Name and Department Id fields. If you User csv file contains Department Names (Users are associated with Departments via Department Names) then you don't have to import Department Ids.

10. When all fields are matched, click on **Next**.

ne Import Screen is c	lisplayed.		
TAPIT Import Wizard 1.1.	0		_ID)>
Import			
	DEPARTMENTS	IMPORT	
IMPORT	Tapit Database Fields	IMPORT LIST Text File Columns	
Import Wizard imports	Department Name	= dept	
data the way it is matched in the Import	Department Id	= dept no.	
List.			
Data from the Text			
File Columns is imported to the			
corresponding Tapit			
Fields.			
If you need to edit the IMPORT LIST			
click on the 'c <back'< td=""><td></td><td></td><td></td></back'<>			
button to go back to the 'Match Fields'			
screen. Add/remove			
the Import List items.			
TO IMPORT NOW			
click on the 'Finish'			
button.			
			•
	Land Back		1
Cancel	<< Back	Next >> Finish	

This screen displays the final field selection for import.

11. Import Wizard imports data the way it is matched in the Import List.

If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. Add or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove** item form Import list buttons.

Otherwise, click on **Finish** to import.

12. When Department Import is completed, a confirmation message appears.

ImportTapit	×
Import Completed. Please see Import	Log for more information.
ОК	

Click on OK.

13. Your Department Import is completed.

Import screen display changes.

The top of the screen displays statistics.

Following our example below:

"Total unique (csv) Departments: 5" - there has been 5 unique Department Names found.

"Total records imported to 'Department' table:"3 – 3 Departments were imported

"Total records rejected: 2" - 2 Departments were not imported, because they already exits in TAPIT.

S. TAPIT Import Wizard 1.1.0			
Import			
	DEPARTMENTS IMPORT	ור	
Total unique (csv) Departments:5	Total records imported to 'Department' table: Total records rejected: 2 3		
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records. Rejected Records File Rejected Records File Rejected records (if any) are not imported to the TAPIT database because the Department Names already exits in TAPIT.	View Log Information - File: 022805122917_Log.log View Import LOG File 022805122917_Log.log file is located in: C:VPtogram Files\Tapk Import\LogFiles\ folder. Departments import has been completed 2 records have been rejected because the Department Names already exist in TAPIT. Please click on 'Continue with User Import' button to import Users]	
Cancel	Continue with User Import Finish		

If some **records are rejected** that means they already exist in TAPIT. You don't need to import them again.

Log file is a text file that contains information on this import. It resides in a subfolder of the folder where TAPIT Import is installed. If default options were accepted when installing TAPIT Import, this file is located in C:\Program Files\TAPIT Import\LogFiles folder. To view log file click on **View Import LOG file**.

The LOG file opens in Notepad.
The log file produced by our example import:

FIELDS ARE MATCHED THE FOLLOWING WAY:

Department Name = dept (Field0 DeptName) Department Id = dept no. (Field1 DeptId)

5 unique Department Names to import.

3 imported records.

2 rejected records.

14. You can proceed with User Import. Click on the Continue with User Import button. Locate Files screen appears.

Enter the Path to the User CSV file, or click on the **Browse** button to find it The path to the TAPIT Database is saved from the Department Import and should not be changed.

TAPIT Import Wizard 1.0.23			
Locate Files			
	USERS IMPO	RT (following the Departm	ents Import)
	Import USERS from CS	/ File:	
	I want to import USER (C:\csvFiles\UserDept)	from the same file used to impo same csyl	at DEPARTMENTS
	DB enter the nath in the cay file	or click on Browne' to find it	
	C:\csvFiles\UserDeptName.csv		Browse
	Import TO TAPIT Datab	ase (tapitdb.mdb) File: —	
	Enter the path to the TAPIT datab	ase (tapitdb.mdb) file or click on Brows	e' to find it.
	C:\Tapitw32\DATA\MAIN\tapito	b.mdb	Rouse
Cancel	<< Back	Next >>	Finish

15. Click on Next

Column Headers screen comes up

This screen is different from what you have seen when importing Departments.

Associate Users with Departments part has been added. Since we have imported both Department Names and Department Ids, we need to select one of them to associate Users with Departments. The selection depends on what field is listed in the User csv file. Our file contains Department Ids. We are going to associate Users with Departments via Department Id.

Column Hea					
	USERS IMPO	RT (following the	Departments I	mport)	
Examples of CSV fil	es				
Using Departm Users	ent Name field to a with Departments	ssociate	Using Depart Users	ment ID field to asso with Departments	ciate
Associate Users wit	th Departments				
Select one of the fol	lowing TAPIT fields	to associate Users	with Departme	ints.	
C Department Name	Select this option if your	CSV file lists Users with th	e corresponding to #	em Department NAMES.	
e opuration realie					
C Department Id	Select this option if your	CSV file lists Users with th	e corresponding to th	hem Department IDs.	
Does the first row c	ontain header? Sample Tea	kt File Data (max 1	.00 records sho	own)	
Does the first row c	ontain header? Sample Tex surcharge per Minute	kt File Data (max 1 surcharge per Cal	00 records sho	dept no.	
Does the first row c est2 2831	ontain header? Sample Tex surcharge per Minute	kt File Data (max 1 surcharge per Cal	00 records sho	dept no.	1
Does the first row c est2 2831 2832	ontain header? Sample Tes surcharge per Minute 0.3	kt File Data (max 1 surcharge per Call	.00 records she	dept no.	1
Does the first row c est2 2831 2832 2833	ontain header? Sample Tes surcharge per Minute 0.3	kt File Data (max 1 surcharge per Call 2	.00 records she	dept no.	1
Does the first row c ext2 2831 2832 2833 2834 283	ontain header? Sample Tex surcharge per Minute 0.3	st File Data (max 1 surcharge per Call	.00 records sho	dept no.	1 1 2 2
Does the first row c ext2 2831 2832 2833 2834 2834 2835 2836	ontain header? Sample Tex surcharge per Minute 0.3	st File Data (max 1 surcharge per Call	.00 records sho	dept no.	
Does the first row c ext2 2831 2832 2833 2834 2835 2836 2836 2837	ontain header? Sample Tex surcharge per Minute 0.3	st File Data (max 1 surcharge per Call	00 records sho	dept no.	
Does the first row c ext2 2831 2832 2833 2834 2835 2836 2837 2838	ontain header? Sample Tex surcharge per Minute 0.3	st File Data (max 1 surcharge per Call	00 records sho	dept no.	
Does the first row c ext2 2831 2832 2833 2834 2835 2836 2837 2838 2838 2838 2838 2838 2838 2838 2838 2838 2868	ontain header? Sample Tex surcharge per Minute 0.3	st File Data (max 1 surcharge per Call	00 records sho	dept no.	
Does the first row c ext2 2831 2832 2833 2834 2835 2836 2837 2838 283	ontain header? Sample Tex surcharge per Minute 0.3	kt File Data (max 1 surcharge per Call	00 records sho	dept no.	
Control Contro	ontain header? Sample Tex surcharge per Minute 0.3 \$0.05	kt File Data (max 1 surcharge per Call	00 records sho	0.50%	
Does the first row c est2 2831 2832 2833 2834 2835 2836 2836 2837 2838 2868 8774 48013 1000	ontain header? Sample Tex surcharge per Minute 0.3 \$0.05	kt File Data (max 1 surcharge per Call	00 records she multiplier 0.8	0.50%	
Does the first row c est2 2831 2832 2833 2833 2835 2836 2836 2837 2838 2868 8774 48013 4013	ontain header? Sample Tex surcharge per Minute 0.3 \$0.05	kt File Data (max 1 surcharge per Call	00 records she	0.50%	

16. Does the first row contain headers?

Check this option if the first line of your CSV file contains TEXT field names.

Does the first row contain header?

The Department CSV, used in our example, contains headers (see **Format of a Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns

17. Click on Next.

The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT fields.

TAPIT Import Wizard 1.1.	0					
Match Fiel	ds					
		USERS IMPORT	(following th	e Depai	rtments Import)	
Becords to IMPORT:		Sample Text F	ile Data (ma	< 100 re	cords shown)	
	first	last	auth		auti	ant2 a
17	David	McDonald	auur		CMT	2020
	Halan	Smith				2030
CTED 1	los	SHIM				2030
Coloct on item from	Jam	Innes				2020
'Text File Columns'	1 T					•
list and a						_
corresponding field						
name from 'Tapit	Tapit	Database Fields	Match Fi	elds	Text File Colu	imns
Database Fields list.	User Extension		▼ = ₀	st2		-
STEP 2	TADIT DEDA	DIMENT ID! field i	ac to be mate	the bod	h the correction	ding field in a
Click on the 'Add	TAPIT DEPA	text file to a	ras to be mati ssociate llser	s with D	enartments	ung neiu m a
matched' button		text me to u	ssociate oser	s mai b	epartments	
to save this relection for Import		Add matched	fields to t	he Im	port list	
Repeat steps 1, 2				1.4		
until all fields are	Department Id		-	dept no.		
matched.	User First Nam	8	-	first		
Each Tanit Field	User Last Nan	8	-	last		
except Extension	User Authoriza	tion Code	-	auth		
can be matched with	User Suicharg	e Per Minute	-	surcharg	e per Minute	
ONLY one Text File	User Surcharg	e Per Call	-	surcharg	e per Call	
Column.	User Multiplier	(percent)		multiplier		
	User Extension	1		ext1		
Extension Field	User Extension	1	-	ext2		
is a required field						
is a required new	•					<u> </u>
		Remove	tom from t	he Im	nort list	
		Kentove i	cem from t	me Im	port list	
Cancel		Back	biout		1	alich .
Cancel		~ DOLK	INEXT	~>	FI	ilisti.

18. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

	Tapit Database Fields	Match Fields	Text File Columns
	User Extension	💌 💳 [ext2	•
19.	Click on Add matched fields to the	Import List.	
	Add matched	fields to the Imp	oort list

The matched fields appear on the Import List.

Tapit Database Fields Mate	h Fie	elds Text File Columns
	— [c/	
TAPIT 'DEPARTMENT ID' field has to be text file to associate	e matc Users	hed with the corresponding field in a with Departments
Add matched fields	to ti	ne Import list
Department Id	=	dept no.
User First Name	=	first
User Last Name	=	last
User Authorization Code	=	auth
User Surcharge Per Minute	=	surcharge per Minute
User Surcharge Per Call	=	surcharge per Call
User Multiplier (percent)	=	multiplier
User Extension	=	ext1
User Extension	=	ext2

WHEN MATCHING USER FIELDS

The field associating Users with Departments has to be matched. In our case it is the Department Id field.

User Last Name has to be included in the Import List. This TEXT field (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

All other TAPIT fields can be matched with only one TEXT field (column).

20. When all fields are matched, click on **Next**. The **Import Screen** appears

TAPIT Import Wizard 1.1. Import	0		(ملد
	USERS IMPORT (following the	Departments Import)	
IMPORT	Tapit Database Fields	IMPORT LIST Text File Columns	
Import Wizard imports	Department Id	= dept no.	
data the way it is matched in the Import	User First Name	= first	
List.	User Last Name	= last	
Data from the Text	User Authorization Code	= auth	
File Columns is	User Surcharge Per Minute	 surcharge per Minute 	
imported to the	User Surcharge Per Cal	 surcharge per Call 	
corresponding Tapit	User Multiplier (percent)	= multiplier	
Fields.	User Extension	= ext1	
tine of been used to	User Extension	= ext2	
the IMPORT LIST			
click on the '< <back' button to go back to the 'Match Fields' screen. Add/remove the Import List items.</back' 			
TO IMPORT NOW click on the 'Finish' button.			
	1		2
Cancel	<< Back	Next >> Finish	

This screen displays the final field selection for import.

TAPIT Import Wizard imports data the way it is matched in the Import List.

If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. Add or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove** item form Import list buttons.

Otherwise, click on **Finish** to import.

21. When import is completed, a confirmation message appears.

ImportTapit X
Import Completed. Please see Import.Log for more information.
ОК

Click on OK.

22. The Import screen changes.

TAPIT Import Wizard 1.1.0		_D×
Import	<u> </u>	
USERS	IMPORT (following the Departments Import)	
Total text (csv) records: 17	Total records imported to 'User' table: 12 Total records rejected: 5	
Import Log File Click on the View Import Log File' button to view this file in the Notepad exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 022805122917_Log.log View Import LOG File 022805122917_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder. View Rejected Records - File: 022805122917_Rejected.csv	
Rejected Records File Click on the View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records CSV File 022805122917_Rejected.csv file is located in: C:VPtogram Files\Tapit Import\LogFiles\ folder. How to REVISE Rejected Records CSV file Import REVISED Rejected Records CSV file Import REVISED Rejected Records CSV File Import REVISED Rejected Records CSV File	
Cancel	<< Back Next >> Finish	

Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 17 total TEXT records, 12 TEXT records were successfully saved (imported) into the TAPIT Database. 5 TEXT records were rejected (were not imported).

Total text (csv) records: 17	Total records imported to 'User' table: 12	Total records rejected: 5

23. To find out more about rejected records click on the View Import Log File button.

View Log Infor	mation - File: 022805122917_Log.log	g
	View Import LOG Fil	e
022805122917_ C:\Program Files	Log.log file is located in: \Tapit Import\LogFiles\ folder.	

The log file contains two parts: the Department part and the Users part.

Scroll down to see the Users Import part.

FIELDS ARE MATCHED THE FOLLOWING WAY:

Department Id $=$ dept no.	(Field8 DeptId)
User First Name = first	(Field0 UserFirstName)
User Last Name $=$ last	(Field1 UserLastName)
User Authorization Code =	auth (Field2 UserAuthCode)
User Surcharge Per Minute	= surcharge per Minute (Field5 UserSurchargePerMinute)
User Surcharge Per Call $=$	surcharge per Call (Field6 UserCallSurcharge)
User Multiplier (percent) =	multiplier (Field7 UserMultiplier)
User Extension $= ext1$	(Field3 Extension)
User Extension $= ext2$	(Field4 Extension)
********	***************************************

(why records were rejected

rec # matches the record number in a rejected file csv)

5 rejected records.

24. To view rejected records click on the View Rejected Records CSV File button

View Rejected Records - File: 022805122917_Rejected.csv	
View Rejected Records CSV File	
022805122917_Rejected.csv file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.	

25. The following screen opens up. Click on View File



The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad).

The entries in **bold** are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.

The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

"Rec Number", "last", "dept no.", "first", "surcharge per Minute", "surcharge per

Call", "multiplier", "auth", "ext1", "ext2"

"1", "Smith", "1", "Hellen", "0.2", "", "", "**2830**", "2832"

"2",**'''**,"2","Joe","","","","2828","2833" "3","Constant","3","Daniel","","","","**A143**","2836"

"4", "Dill", "5", "Connor", "", "", "**401885**", "", "48014"

"5","Chuang","5","Daniel","","","","99**#8 ","","48017"

The same Rejected Records file after corrections:

"Rec Number", "last", "dept no.", "first", "surcharge per Minute", "surcharge per

Call", "multiplier", "auth", "ext1", "ext2"

"1","Smith","1","Hellen","0.2","","","","2855","2832"

"2",**"Brown"**,"2","Joe","","","","2828","2833"

"3", "Constant", "3", "Daniel", "", "", "", "", "4143", "2836"

"4","Dill","5","Connor","","","401995","","48014"

"5", "Chuang", "5", "Daniel", "", "", "41998", "", "48017"

The Rejected Records file needs to be saved in Notepad under the same name.

26. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV**

File.

Import REVISED Rejected Records CSV File

27. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

Tapit Import	×		
This action will IMPORT C:\Program Files\Tapit Import\LogFiles\022805122917_Rejected.csv file to TAPIT. If you have revised 022805122917_Rejected file and saved changes under the same name and path (C:\Program Files\Ta Import\LogFiles\022805122917_Rejected.csv) then click on OK. Otherwise click on CANCEL and open the file for correction using the 'View Rejected CSV File' button.	pit		
OK Cancel			
. TAPIT Import Wizard will import records from the Rejected Records file.			

When import is finished it will display the following message:

Tapit Import	X
Import Completed. Please see Import.Log for more infor	mation.
ОК	

Click on OK.

29. The Import screen changes to reflect the new import results (import from Rejected Records csv file). In our example:

"Total text (csv) records: 5" - total number of text records in the Rejected Records csv file.

"Total records imported to 'User' table:"5 – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.

S. TAPIT Import Wizard 1.1.0		_O×
Import		
USERS	IMPORT (following the Departments Import)	
Total text (csv) records: 5	Total records imported to 'User' table: 5 Total records rejected: 0	
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 022805122917_Log.log View Import LOG File 022805122917_Log.log file is located in: C:\Ptogram Files\Tapit Import\LogFiles\ folder. There are no rejected records - the csy file has not been created	
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records CSV File	
Cancel	<< Back Next>> Finish	

Your import is completed.

30. You can go to TAPIT and view Users/Departments screen.

NOTE:

In our example one of the Users records had a typo in the Department Name. Instead of Customer Service it was spelled Customer Services.

To demonstrate how such error can impact import results we did not correct it.

As a result we have imported two departments Customer Service and Customer Services instead of one.

😫 Users / Departments					
	Print		Exit		
	Hierarch	ny Depa	artments	Users	
Sort By: Department					
ACCOUNTING Customer Service Human Resources IT Sales					

1	Hierarchy Departments	Users			User
	Sort By: User	Department	Auth. Code	Extension	User Last Name / Company Dermack
	Brown Joe Brown Joe Chiera Dianne Chiera Dianne Chuang Daniel Constant Daniel Constant Daniel Darling Tyler Davis Ben	IT IT IT Sales Human Resourc Sales	41998 401885 UPSCOM	2833 A 2828 2826 2835 48017 2836 4143 48013 48015	User First Name Ashley Authorization Code Surcharge Per Minute Surcharge Per Call Multiplier %
	Dermack Ashley Dill Connor Evans Erick Jones Larry Jones Larry Kroeger Ann	Human Resourc Sales Customer Servic IT Sales	401995 401565	48014 8774 2834 2827 48018	Department Human Resources